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ABSTRACT

Boston College's Management Development Program, which provides 12 weeks of formal management education, is described, and examples and models of materials are presented. Attention is directed to program planning, design, and results; problems encountered; and issues pertaining to advanced-level management development, particularly as it relates to skills development, manpower planning, and career development. For each of the following 14 program units, information is presented on objectives, format, major topics, reading assignments, and evaluation results: university goals; organization, functions, relationships; university governance; university planning; academic administration; financial and business operations; enrollment management; management information systems; university relations; behavior in organizations; management in student life areas; university personnel relations; planning and conducting effective meetings; and program summary and conclusion. Approaches for measuring and monitoring the program include direct observation, written evaluation, group discussion, and supervisor survey. Key factors that have been critical to the success of the program and experiences with respect to the following areas include: program objectives, participants, content, methods, logistics, and schedule. Appended materials include: examples of program announcements and letters, teaching materials, program evaluation form and survey, and descriptions of the second phase of the program. (SW)

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MANAGEMENT DEVELOPMENT
FOR
COLLEGES AND UNIVERSITIES

A report of the Boston College experience in the design and implementation of its successful Management Development Program.

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This report has been prepared with the support of a Mobil Foundation award – to provide assistance to colleges and universities in planning and conducting internal programs for developing management personnel.

Frank B. Campanella
Executive Vice President

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Associate Professor, School of Management

Leo V. Sullivan
Director of Personnel

BOSTON COLLEGE – APRIL, 1981

HE 014997

PREFACE

It seems more evident now, than at any time in the recent past, that colleges and universities must be managed effectively. The litany of problems to be faced during the next decade are well-known, and need not be enumerated again here. I would argue, however, that our institutions of higher education should not embrace "Management" in the same uncritical fashion that characterized the adoption of management techniques immediately following the crises of the late sixties.

In the circles of the academy we continue to experience a wave of articles, books, seminars, conferences and consultants on the topic of "Management." Somehow I experience a sense of déjà vu. Have we not been here before; in the late sixties when the industrial long-range planning process was sold as the panacea for the financial difficulties most universities were experiencing; or in the early seventies when conferences and consultants for PPBS (Planning/Programming/Budgeting Systems) dominated the pages of higher education publications; or more recently when MBO (Management by Objectives) moved to the forefront of the corporate techniques and systems being sold to college and university administrators? The newest entry to the field is ZBB (Zero Base Budgeting). Can one imagine a budgeting system less suitable for academic departments?

It seems apparent that the net financial impact associated with the uncritical adoption of specialized management techniques, developed in the industrial sector has been negative. The actual financial benefits have accrued to the purveyors of conferences, consulting services, and pre-designed reporting forms, while the coffers of academe have been reduced in kind. The impact of these systems and techniques on colleges and universities is barely noticeable.

Management Development at Boston College was conceived within a hierarchy of critical convictions. 1) That effective management of institutions of higher education will continue to be an essential factor for their survival and success. 2) That management education, in the context of the full and rich traditions particular to institutions of higher education, is absolutely necessary. 3) That the concepts of good management together with an understanding of the institution should permeate the organizational structure. 4) That all middle-managers should be given the opportunity to participate in Management Development Programs designed to achieve these ends.

This book attempts to document six years of experience at Boston College with management development programs tailored to managers in institutions of higher education and, not surprisingly, based on cases developed about Boston College itself. You will find the text divided into two major segments. The first describes and focuses on the creation of a Management Development Program, MDP I, and on the critical decisions related to what materials are to be taught, to whom, by whom, when and in what setting. It describes the philosophy of the program and its primary objectives. It concludes with a discussion of program evaluation, and with some thoughts about the future.

Part Two is a sample assemblage of home-grown teaching materials and cases. While we believe that most of the materials in Part One, describing the creation of the program, are directly transferable to other colleges and universities; the same is not true of the cases and other materials in Part Two. These latter are included to provide examples and models of materials, which can be developed to teach about management in institutions of higher education; and about the particular management concerns of a specific institution.

In the final chapters there are some thoughts about the future of management development programs. "Where do we go from here?" We have experimented with two or three approaches to an "MDP II" and have some additional ideas which we believe have some potential. There are, however, two obstacles we have not yet been able to surmount.

Boston College's approach to Management Development I is affordable, sensible, and transferable to other institutions, provided there is someone near the top ready to commit to it. Advanced management programs in institutions of higher education face two sorts of problems. The first relates to the availability of resources, both human and financial. The second is less apparent but relates to the "wide, flat organizational structure" typical of institutions of higher education. In effect there are usually just one or two layers of management between entry level administrative positions and Vice Presidential levels. The questions which this raises, both for management and for the development of managers in the fullest sense, are many and challenging. And as indicated in the text, we are continuing to work to arrive at solutions that are sensible for the institution, while at the same time promising for the professional development and advancement of that critical cadre of middle managers.

Needless to say Boston College is most pleased and grateful for the support of the Mobil Foundation, which has allowed us to retrace our steps back six years, in order to document the key decisions and critical elements which went into the development of MDP I. I would like, in particular, to acknowledge the support of Mr. W. W. Richardson, Assistant to the Chairman of the Mobil Oil Corporation, who shortly after our receipt of the Mobil Foundation award, participated in one of our all-day MDP sessions.

If every structure has a cornerstone, the cornerstone of MDP at Boston College is Professor Raymond F. Keyes of our School of Management, who from the conception of the program, has exhibited enormous quantities of endurance, enthusiasm and energy. The two hundred and fifty managers who have completed the program are the beneficiaries; and are ready witnesses to his extraordinary efforts. Finally, Miss Judy Kissane, my own Administrative Assistant, must be recognized for her superlative efforts in handling all of the program logistics, including schedules, teaching materials, invitations, acknowledgments, meeting arrangements and a thousand-fold details, which make a good program a "classy" program as well.

While we are proud of our efforts and the resulting Management Development Program, and pleased to be able to document our experiences so that they may be shared with others, we are not satisfied. Clearly more can be done to create and build management education opportunities, in the context of the rich traditions of colleges and universities. The authors would be pleased to discuss and dialogue with others interested in this prospect.

Dr. Frank B. Campanella
Executive Vice President
Boston College
April 13, 1981

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SECTION I
INTRODUCTION

A Successful Program:

In the Fall of 1975, Boston College introduced the first session of its Management Development Program for Administrative and Professional Staff. By the Spring semester, 1980, the university had completed nine successful, 12-week sessions of its basic MDPI program plus several follow-up seminars in its advanced level MDPII program. The general reaction to the program has been most favorable. In a letter to Executive Vice-President Frank Campanella in October, 1976, Dr. Jack B. Levine, Executive Director of the Higher Education Management Institute made the following observation:

> "The Boston College program in management development that you described in your letter to Dr. Bellman and in your telephone conversation with me, is one of the few well conceived programs of its kind that we have uncovered thus far."

Boston College is a private university of approximately 14,000 students and 2500 faculty, administrative, and support personnel. In recent years, its administration has been actively involved in the installation of an overall program to provide professional management for the university, including long-range planning, financial and academic planning, enrollment management, an advanced management information system, and human and physical resource development. The Management Development Program is part of this overall program.

Program Highlights:

The basic management development program consists of fourteen five-hour sessions taught by either faculty or administration members at Boston College. Beginning with a two-day live-in seminar during which University President J. Donald Monan, S.J., outlines Jesuit traditions and institutional goals and objectives, the program runs a gamut of administrative areas. Through the program, participants learn about the diverse university functions and components, examine the key elements of the management process and their application to the University environment, examine financial management in higher education, spend a significant portion of time dealing with human and organizational behavior, and finally, attempt to develop in all these areas specific skills and knowledge that will help them in the day-to-day performance of their duties.

With consultation and approval of the University Vice-Presidents, materials were put together and "cases" written for the program, many delineating the management concerns of "Bolton College", a thinly disguised identification of Boston College. Importantly, two decisions were made: 1) to have the program conducted *by* Bolton College people *for* Boston College people; 2) to include in the cases and presentations information comprised of actual facts and figures used by top management at the University in its planning and decision-making. In addition, the program utilized other teaching techniques including selected educational cases, incident cases, a wide range of management readings, role-playing and in-basket exercises, video sessions, group projects, and other approaches designed to encourage active participation. Many of these materials were designed specifically by the teaching staff for use in the program.

Direction and Goals:

The direction for the program came from Executive Vice-President, Dr. Frank Campanella. At the outset, Dr. Campanella talked to School of Management Professor Ray Keyes and Personnel Director Leo Sullivan. Working together, these three drafted the specific outline for a 12-week program which, after some revisions, was put into place. As originally stated, the overall goal of the program was "to further strengthen the University by improving current and future management performance through a program of formal management education. Specific objectives of the program include the following:

1. To encourage our administrators and managers to understand and identify with our Jesuit tradition, educational ideals and institutional objectives.
2. To broaden their views of the University organization and functions and to stress the importance of the interdependence of these functions.
3. To examine the key elements of the management process and their application to the management of educational institutions.
4. To study financial management in higher education in order to better understand sources and uses of funds, financial practices, control procedures, management information systems and financial planning.
5. To explore the questions and problems relating to human behavior in the academic environment including organizational theory, interpersonal relationships and personnel management.
6. To encourage the development of skills which are useful to managers in the performance of their responsibilities.

Program Evaluation:

The program has now run for five years. One hundred and ninety-five managers have participated and provided feedback on program effectiveness through informal discussions and through a formal program evaluation questionnaire. Although participants have been selectively critical of individual instruction blocks (too much information, too little, etc.), their collective endorsement of the program has been most positive. In a recent survey of University supervisory personnel (executives and top managers), the program received a solid vote of confidence.

Executive Vice-President Campanella sees the program curriculum as "fluid" and says he isn't even sure that the curriculum, while significant, is the most important component of the management development program. What perhaps is most significant is the decision to formally recognize the importance of the middle management function and to develop the talent therein; this is critical if the University is to run lean and well and survive in an increasingly hostile environment. Dr. Campanella says this can be done through the management development program by improving the technical knowledge of the University's managers, by developing with them a better overall perspective of the entire university, and by nurturing an esprit that has not always existed before.

Purpose of Study:

The purpose of this study is to record and disseminate to other colleges and universities the results of Boston College's experience in the design and implementation of its basic management development program. We believe that the description of this experience can be helpful to interested parties in other colleges and universities who may be considering developing management development programs in their own institutions. At the same time, it may provide some useful insights and comparisons for persons who are actively involved in the conduct of on-going programs. With this in mind, the specific objectives of this study are:

1. To record and review in some detail the basic level program, including planning considerations, program design, program results, and some examples of effective materials used in the program.
2. To provide a straightforward discussion of the problems we encountered and the conclusions we reached from our experiences.
3. To raise questions concerning advanced level management development, particularly as it relates to skills development, manpower planning, and career development.

Report Structure:

Subsequent sections of this report will examine in greater detail the important elements involved in the development of the Boston College Management Development Program:

1. Section II discusses the history of the program with specific emphasis placed on the key questions and decisions addressed in the planning stage.
2. Section III reviews the actual content of the program in its current form and shows how the plans and objectives are translated into specific course presentations. This discussion also includes observations about our early experiences and some of the problems that we encountered.
3. Section IV describes our on-going approach for program evaluation and change. This section recognizes the importance of having a built-in response mechanism and a sensitivity to the human aspects of administering the program.
4. Section V attempts to draw some conclusions concerning those facets of the program which worked quite well and those which were less effective. These conclusions are presented in an effort to provide some guidance and assistance to individuals or institutions concerned with the development of their own management development programs.

5. Section VI presents some of our ideas and plans for the future of our management development program. It describes some of our recent efforts in developing an advanced level MDP Program and it identifies some of the important questions facing us as we consider a broader commitment of administrative and financial resources.

6. The Appendix contains four parts:

   *Part A – Examples of program announcements, letters, schedules, certificate of completion

   *Part B – Examples of teaching material designed for the program

   *Part C – Program evaluation form and survey

   *Part D – Advanced level management development program descriptive materials

SECTION II
HISTORY OF THE PROGRAM

Original Impetus:

The impetus for the Boston College Management Development Program came directly from Executive Vice-President, Dr. Frank Campanella. Faced with serious financial and management problems in 1973-74, the President, J. Donald Monan, S.J., assembled a team of senior executives under Dr. Campanella to develop more sophisticated plans and programs in the areas of financial and admissions management, academic administration, and human resources development. The management development program was initiated as part of this overall program. In early 1975, Dr. Campanella invited Sullivan and Keyes to work with him in planning a management development program for the University. The authors of this report, Campanella, Keyes, and Sullivan, worked initially as a planning committee for the program. The subsequent paragraphs will discuss our planning approach.

Planning Stage:

The initial planning for the program was done during the late spring and early summer, 1975. We met weekly to clarify objectives, exchange ideas, and explore program alternatives. Our preliminary research indicated that very little was being done (or published) in the area of management development in higher education. We reviewed some information on the Institute for Educational Management (IEM program) at Harvard. This material provided a useful frame of reference in terms of program coverage. We also received helpful information from Massachusetts Institute of Technology describing some of their internal management development programs. In addition, we had a working knowledge of management development programs as they have evolved in the industrial sector. Against this background, we decided to build our own program from the ground up. Our initial attention was focused on the basic questions: Why, Who, What, How, Where, and When?

Planning Questions:

Our initial planning was done within the framework of the following key questions:

1. *Why* do we need a management development program? What important needs do we identify? How are these needs translated into specific *program objectives?*
2. *Who* are we attempting to reach with the program? Are we designing a program for top managers? Middle Managers? Key Managers? All managers? Who are the *program participants?*

3. *What* areas should be covered in the course design to respond to the needs and objectives previously identified? What *program content* best meets the needs of the people who will be participating?

4. *How* can we best present the subject areas in ways that are both substantive and interesting? Should we use outside cases or design our own cases? Should we use outside professionals or university personnel? What *methods* are best for the kind of program we are attempting to offer?

5. *Where* should we locate the program? On-campus? Off-campus? What facilities will we need? What *program logistics* should we consider?

6. *When* should we offer the program? How long should the program be? How often should we meet? Should we meet on week-ends? Week-days? Evenings? How can we best *schedule* our sessions to fit the circumstances of our participants and session leaders?

These questions provided the substance for the weekly planning meetings. It would be incorrect to say that we followed an organized sequence of questions and answers. In fact, our initial discussions were free-wheeling and unstructured. As we proceeded, however, we became more formal in our efforts to capture and record the products of our discussions. At a particular point, we felt comfortable with our ideas and our general agreement and it was then decided to put together a rough draft of a program for further discussion and evaluation. This draft served as a working tool for communication and discussion with key executives in the University. In late June, Campanella sent the draft, under cover of an introductory letter, to President Monan and to each of the University Vice-Presidents. Keyes then followed up with individual meetings with these executives to gain their understanding of the program, to solicit their suggestions, and to explore their interest in participating in the program in some teaching capacity. This early involvement of the key executives was an important part of the subsequent success of the program.

Planning Stage Decisions:

The planning questions served to focus our attention on the key decisions to be made in the planning stage. Some of these decisions are summarized below.

1. *Program Objectives:* In formulating our program objectives, we decided that:

    a. The program would recognize the importance of professional management in the University and provide a visible commitment to improving management performance through management education.

    b. Initially, it would be a basic level program covering a broad range of management areas. In-depth coverage of specific areas would be incorporated in a follow-up program.

    c. It would create opportunities for people to expand their knowledge and experience beyond the day-to-day responsibilities of their jobs – to meet other managers and to learn about other operating areas of the University.

    d. It would focus attention on the development of skills: management skills and personal skills.

e. It would provide an opportunity for senior management to communicate more effectively with middle management – to clarify University goals and actions and to report on what is going on.

2. *Program Participants:* In addressing the question as to who would participate in the program, we decided that:

   a. The program would be aimed at the middle management level consisting of persons up to and including the level of Director and Associate Dean.

   b. Vice-Presidents and Deans would be encouraged to participate in the program as session leaders and/or panelists.

   c. Future consideration would be given to an appropriate program for executive development.

   d. Managers would be selected to participate in the program through their appropriate Vice-Presidents. At the beginning of the year, each Vice-President would confer with his directors and put together a list of nominations. These lists would be reviewed by the Executive Vice-President and the Personnel Director to develop a heterogeneous group of participants. To the extent possible, the groups would be composed of:

      (1) A good mix of managers from different University departments or areas;
      (2) An appropriate mix of men and women;
      (3) A member of the Jesuit community;
      (4) An academic administrator.

3. *Program Content:* In terms of the substantive design of the program, we decided that:

   a. The program would evolve from the broad to the specific:

      (1) The initial sessions would consider the University at large – its origins, traditions, goals, governance, and executive function.

      (2) The middle sessions would address the three basic areas of administration of our educational institution . . . [1] educational administration, [2] financial management, and [3] business management. This would include academic administration, enrollment management, financial planning, financial and business operations, and management information systems.

      (3) The final sessions would focus on human resource development in student life service areas, personnel relations, group dynamics, and personal skills development.

   b. The program would be built around the unifying theme of the Management Process. We felt that the concepts of planning, organizing, directing and controlling were applicable in all areas and at all levels of the University. We were particularly interested in improving the overall understanding of the critical role of planning in the management of an educational institution.

4. *Program Methods:* One of the most difficult decision areas centered around the question of whether to use external versus internal people to design and conduct the various sessions. We felt that the external people would make more professional presentations on the basis of their prior experience. The use of internal people, on the other hand, would provide opportunities for developing the skills and professionalism of our own staff. We also recognized that there would be additional advantages in terms of the economics and program flexibility and control. Against this background, we decided that:

   a. We would use internal resources from our executive, management, and faculty areas to design and present the sessions.

   b. We would use Boston College, whenever possible, as a "live case" for the presentations, problem identification, and discussion. This would include the use of actual, current data about the University as well as forthright discussions of problems and opportunities.

   c. We would encourage a presentation format for our sessions which would emphasize active participation and exchange of ideas and views. Towards this end, we would encourage seminar leaders to develop specific cases and exercises which would relate directly to our particular environment and problems.

   d. We would establish an atmosphere of "professional informality." To the extent that we were able to effect economies in the area of teaching costs, we would utilize funds to provide first class arrangements for the program including professional meeting rooms (appropriately furnished and equipped), teaching materials, luncheons and socials, etc.

   One important question concerned the actual administration of the program. Who would be responsible for what? This discussion was answered as a by-product of the meetings and discussions in the planning stage. Each of the three planners agreed to assume responsibility commensurate with his position and availability:

   a. Dr. Frank Campanella, as Executive Vice-President, would assume overall direction of the program. His leadership and participation would provide a clear signal that this was a program that had a strong commitment from the top.

   b. Leo Sullivan, as Director of Personnel, would provide the organizational base and administrative support services for the program, including preparation of notices, meeting materials, advance readings, arrangements, etc. He would also assume responsibility for the program budget.

   c. Ray Keyes, as a faculty member in the School of Management, would act as coordinator of the program, responsible for the actual conduct of the program. He would work directly with the session leaders in developing sessions in line with the program objectives. This assignment would be included as part of his overall teaching load.

   It is significant to note here that, for the most part, participation in the program as a session leader or panelist was to be considered as part of the administrator/manager job. No additional compensation would be paid except in cases where we used faculty members or outside speakers. Even in these situations, the stipends would be modest honorariums, rather than normal compensation for the time and effort involved. Because we would not be using the major portion of our funding for teaching expenses, we would be in a position to use the funds to provide the essentials and niceties in terms of our program logistics.

5. *Program Logistics:* Some of the key decisions in the logistics area included the following:

   a. We decided that the program should start with a two-day, overnight session at a first-rate, off-campus meeting facility. At the outset, we wanted to show that the University was making a serious commitment to the program. The facility itself would have appropriate meeting rooms, living accommodations, and social areas so important in establishing an atmosphere of "professional informality."

   b. Subsequent on-campus meetings would be located at our satellite campus, 1½ miles from the main campus. We wanted to make the meeting place something different from the day-to-day meeting rooms and classrooms which were so familiar to our participants.

   c. We decided to purchase appropriate furniture and equipment for a seminar-type meeting room.

   d. We would provide a meal as part of our meeting format, to encourage socialization and to make it convenient for our participants to attend the meetings.

   e. Each participant would be provided with a notebook with advanced readings, case materials, assignments for each of the sessions.

6. *Program Schedule:* Finally, we considered the questions in the area of scheduling and resolved the following decisions.

   a. The program would consist initially of fourteen sessions. There was no particular reason for picking fourteen except that this number of sessions allowed enough time to cover the topics we had in mind and seemed a reasonable duration considering our experience in "semester" offerings.

   b. After the opening two-day meeting, the groups would meet once a week on Wednesdays. Our initial plan was to meet from 3:00 P.M. to 9:00 P.M. with a break for supper. (After the first meeting, our participants unanimously requested that we change the time because of conflicts with evening activities. We responded by changing to a 1:00-5:30 P.M. schedule preceded by lunch. This problem of legitimate conflicts ruled out further considerations of evening or week-end meetings).

   c. Most sessions would be half-day meetings, unless the specific area to be covered required more time – MIS, for example.

   d. We would run two sessions of the basic program – MDPI – in the first year. On the basis of the response to these initial efforts, we would plan to continue to offer the basic program as long as there were people who wished to participate.

It is important to note that it was not our purpose to run a program for a select group of high potential people. We were wary of the morale problems that can result when management development programs are perceived to be "elitist" programs.

To avoid this reaction and to make management development an opportunity to strengthen our management across-the-board, we decided at the outset that we would make the opportunity available to all management personnel. This avoided problems in the selection process because we could always schedule people for future sessions when we were filled or when we were attempting to build a heterogeneous mix in our group.

Against the background of our planning decision, the following sections of this report will discuss our actual experience with the basic program.

SECTION III
PROGRAM CONTENT

Management Development Program – MDPI:

This section reviews in some depth the actual content of our basic MDPI program in its current form. It considers each of the program units in terms of its purpose, format, assignments, and actual experience. Where appropriate, it discusses the changes in some of the units as they have been developed and improved over the four-year period.

In considering the best format for describing the program content, we considered discussing the original program content as it was developed for our initial session and, against this base, tracing the changes that have been made. As a historical record, this might be most appropriate. However, since our intention is to provide our best advice for program planners, we are opting to present our current version of the program because it is our best effort to date. It reflects much of what we have learned from our experience in offering eight sessions to over 190 managers.

In its current form, our program is composed of fourteen units which proceed from the broad institutional perspective in the initial sessions to an increasingly more specific focus in subsequent units as follows:

University Management Area

Unit 1. University Goals
2. Organization, Functions, Relationships
3. University Governance
4. University Planning

University Operations Area

Unit 5. Academic Administration
6. Financial and Business Affairs
7. Enrollment Management
8. Management Information Systems
9. University Relations

Human Resource Area

Unit 10. Behavior in Organizations
11. Management in Student Life Areas
12. University Personnel Relations

Personal Skills Area

Unit 13. Planning and Conducting Effective Meetings
14. Program Summary & Conclusions

On occasion, it has been necessary to revise the order of the units in order to respond to schedule conflicts of our unit leaders. However, we have been able to make necessary adjustment within the general area – for example, switching the Academic Administration Unit and the Enrollment Management Unit within the University Operations Area. Appendix A-1 shows a typical program schedule.

Establishing a Positive Image:

Before discussing the content of the individual units, it is worthwhile to comment on some of the specific actions that are taken to establish and maintain the image of MDPI as a first-class, professional program:

1. *Top Management Commitment:* In lining up our Unit Leaders, we have been fortunate in getting the enthusiastic participation of our President, Executive Vice-President, area Vice-Presidents, Deans, and Directors. It is clear to all program participants that the program has the commitment and support of our key executives.

2. *Advance Notice:* Several weeks before the initial meeting, each person who has been nominated by his or her Vice-President receives a letter from Executive Vice-President Frank Campanella. The letter invites the nominee to participate in the program and requests a serious commitment in terms of attendance and preparation. A copy of this letter and its attached program announcement may be found in Appendix A-2.

   Shortly before the initial session, each participant is provided with a notebook with advance reading assignments for each of the units. A quick examination of the materials included in this notebook provides the participants with an early appreciation of the scope and coverage of the program.

   In terms of our initial contacts with our participants, we attempt to convey the message that this is a significant, mutual commitment for professional development.

3. *Initial Meetings:* The impressions that are made at the opening sessions can have a long-term impact on the program participants in terms of attitude, commitment, preparation, and participation. With this in mind, we place a great deal of emphasis on "getting off on the right foot", so to speak.

   Our initial meeting is held at Endicott House over a two-day period with an overnight stay. Endicott House is a magnificent estate in Dedham, Massachusetts, owned and operated as a meeting facility by the Massachusetts Institute of Technology. These surroundings provide an impressive atmosphere for professional informality. Please see Appendix A-3 for additional information on Endicott House.

   The two-day schedule is designated to provide for our introduction of the program and Units 1 and 2. The opening session on University Goals is conducted by Rev. J. Donald Monan, our President. This lead session has a profound impact on our participants. They are impressed that the President of the University thinks it is important enough to take time from his busy schedule to meet with them. This impact is strengthened by Fr. Monan's outstanding presentation of our Jesuit tradition and our University goals. Follow-up sessions by Vice-President Peg Dwyer and Executive Vice-President Frank Campanella join in emphasizing the message that this is a program that has top management interest and support.

The combination of the excellent surroundings, the visible executive commitment, and the opportunity for healthy social interaction sets the tone for the program in line with our objective of establishing a first-class, positive image.

4. *Certificate of Completion:* At the end of the program, each participant is given a certificate of completion. This diploma-like certificate is tastefully done, with hand-lettered names, the university emblem, and the personal signature of the program directors. (see Appendix A-4)
5. *Reception and Gifts:* The final session ends with a social to which all previous graduates and seminar leaders are invited (see invitation, Appendix A-5). This social occasion provides the opportunity for the continuation and broadening of the socialization aspect of the program. At the end of the year, Executive Vice-President Frank Campanella sends a letter of appreciation and a gift to each of the seminar leaders. (see Appendix A-6)

Program Units:

The following pages will describe and discuss each of the fourteen program units.

UNIT #1

UNIVERSITY GOALS

Unit Leader:

Rev. J. Donald Monan, S.J.
President, Boston College

Purpose of Session:

To encourage our managers to understand and identify with our Jesuit tradition, educational ideals and institutional goals and to show how they provide a sound basis for our philosophy of management at Boston College.

Format:

Lecture followed by questions and discussion.

Major Topics Covered:

1. Introductory comments concerning the management process with particular emphasis on the planning and importance of goals in planning.
2. Three Major Topics:
   a. History of the Society of Jesus and the Jesuit tradition at Boston College.
   b. The problem of goals in higher education in a period of major change.
   c. Goals of liberal education as reflected in the goals of Boston College.

Advance Reading Assignment:

1. "Jesuit Education at Boston College"
   Internal paper
2. Excerpts from The Report of the University Academic Planning Council.

Session Experience:

The session has continued in basically the same way for the five years. Fr. Monan's lecture follows the same overall framework but his specific commentary reflects his current observations and thinking. Fr. Monan's presentation refelcts his background as a philosopher and a teacher as well as his current role as President of the University. It is quite obvious that the presentation is genuinely stimulating to the participants as evidenced by the follow-up questions and discussions.

UNIT #2

ORGANIZATION, FUNCTIONS, RELATIONSHIPS

Unit Leaders:

This is a three-part session with three leaders:

Part A: Margaret Dwyer, Vice-President and Executive Assistant to the President

Part B: Frank B. Campanella, Executive Vice-President

Part C: Ray Keyes, Faculty Member, School of Management

Purpose of Session:

The overall purpose is to provide participants with a better understanding of the executive function in the University and a broadened view of the University organization, functions, and the interdependence of the functions.

The specific objective for the parts:

Part A: To discuss the role of the President's Office and the role of the Trustees.

Part B: To discuss the overall organization of the University and to explore some of the management challenges at the executive level.

Part C: To present several incidents or crisis situations which provide the opportunity to experience and to discuss the complexity of the problems and relationships which characterize our multiversity.

Format:

Part A: Lecture and discussion.

Part B: Lecture, discussion, explanation of Bolton College case materials.

Part C: Executive in-basket exercise and discussion.

Major Topics Covered:

Part A:

1. Role of the President's Office
2. Functions of Board of Trustees
3. Working relationships

Part B:

1. Introductory comments on planning, organizing, directing control – Practice versus theory
2. Management Style
3. Boston College/Bolton College – explanation of "live-case" materials

Part C:

Executive level issues and decisions.

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Advance Reading Assignments:

Part A:

1. Board of Trustees Membership List
2. Committee Assignments
3. By-Laws of the Board of Trustees

Part B:

1. "Management Science and Business Practice"
   Harvard Business Review, July-August, 1973
   C. Jackson Grayson, Jr.
2. "The Manager's Job: Folklore and Fact"
   Harvard Business Review, July-August, 1975
   Henry Mintzberg
3. "The Managerial Merry-Go Round"
   Harvard Business Review, July-August, 1974
   Theodore Levitt
4. Institutional Description – The University of Bolton College – Case

Session Experience:

The material in Part A on the Role of the Trustees was originally scheduled as a part of a later unit. Our participants recommended that it be moved up in closer proximity to Fr. Monan's talk and our discussion of the executive function. We devote approximately an hour to this topic. The presentation is straightforward and informative. For most participants, this is the first time that they have considered many of the questions relating to the role of the President versus the role of the Trustees.

Part B generally stimulates good thought and discussion. The reading assignments related to this segment are provocative. Frank Campanella uses these readings as a point of departure for his own observations and convictions concerning the management function.

Part C introduces the participants to a lively in-basket designed to show the complex type of problems and decisions that regularly confront the executive officer. In our early versions of the in-basket, we attempted to use actual items of correspondence (properly disguised) as the in-basket items. While the problems were real, we discovered that there were backgrounds, conditions, facts, and circumstances that had to be known in order to make decisions. As a result, we have simplified most of the items in the in-basket to focus on narrower problem situations. Our current version of the in-basket is generating a high level of interest and participation. The follow-up discussion succeeds in getting a healthy exchange of ideas, experiences, and recommendations.

UNIT #3

UNIVERSITY GOVERNANCE

Unit Leader:

Rev. Joseph A. Panuska, S.J.
Academic Vice President

Purpose of Session:

To provide an overall perspective of University governance with particular emphasis on the management and governance of the academic area of the University. Where does decision-making reside and to what extent and in what areas do the various constituencies participate in the decision-making process?

Format:

Lecture, questions, discussion of issues.

Major Topics Covered:

1. Personal reflection on management and leadership
   a. Importance of knowing working group
   b. Leadership styles
   c. Our organizational model
2. Management and leadership in universities
   a. Organized anarchy
   b. Models for governing universities – bureaucratic, collegial, political
   c. Types of universities and some generalizations
3. Management and leadership (governance) of the academic area of Boston College
   a. How things work
      (1) Boston College academic organization
      (2) Decisions in the academic area
   b. How things don't work (a few challenges)
   c. Future plans
4. Comments, questions, discussion of challenges

Advance Reading Assignment:

1. "Leadership Styles"
   Internal paper
2. "Our Organizational Model"
   Internal paper
3. Excerpts from *Policy Making and Effective Leadership*
   Baldridge, Curtis, Ecker, Daley, Josey-Bass Publishers, 1978
4. Chart of Academic Organizations for Boston College
   Internal paper

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Session Experience:

We did not have a separate session on University Governance in our original program. We added this session in response to recommendations from our graduates. For our initial sessions, we were fortunate to have as our session leader Professor Evan Collins from our School of Education. Professor Collins brought pertinent observations and insights from his experience as President of SUNY, Buffalo from 1949-1969. Professor Collins used lecture, group discussion of issues, and case discussion to cover many important topics and problems in the area of university governance. In our most recent session, we called on Rev. Joseph Panuska, our new Academic Vice President to present this unit. This provided an excellent opportunity for Fr. Panuska to present his views in this important area, particularly in relation to the academic decision process. In our discussions with our manager-participants from the various functional areas of the University, we observed that they were generally uninformed in many of the significant areas on the academic side of the university. We feel that many of the misunderstandings that arise between the academic and administrative functions could be resolved through improved understanding of the roles and responsibilities of the different functions. With this in mind, we have revised this unit and the separate unit on Academic Administration (Unit #5) to provide the additional emphasis on the academic area of the University. In line with this objective, we have tried to introduce the academic perspective by including one or two faculty members and academic administrators in each of our groups of participants.

UNIT #4
UNIVERSITY PLANNING

Unit Leaders:

Frank B. Campanella ,Executive Vice President
Ray Keyes , Faculty Member, School of Management

Purpose of Session:

To review the nature and importance of planning in the university environment, particularly as it functions as a major element in the management process. Against the background of planning theory, to review the evolution of planning at Boston College and its current application.

Format:

Lecture and discussion followed by planning exercise

Major Topics Covered:

1. Highlights of planning concepts:
    a. Why plan?
    b. Kinds of formal planning
    c. What is planning
    d. The Planning Process
    e. Parts of Planning
    f. Planning terms
2. Evolution of planning at Boston College
3. Plans – product of the planning process at Boston College
4. A financial planning model
5. Contingency planning exercise
6. Planning perspectives

Advance Reading Assignments:

1. Planning Manual for Universities
   Ohio Board of Regents
2. "The Planning Process"
   Boston College School of Management Internal Paper

Session Experience:

In our experience, the topic of planning is one of the most difficult subjects to present in an informative and interesting manner. Many people find the subject dry or abstract, especially if they have had little or no experience with formal planning. With this in mind, we have experimented with several different approaches in this session with mixed success. It may be useful to review these approaches here.

In our initial sessions, we attempted to teach planning through readings and lecture material based on the writings of George Steiner and Russell Ackoff. After the first few sessions, we realized that the material was too advanced for many of our participants. In addition, they tended to react unfavorably to the emphasis on industrial planning. We supplemented the theoretical with a planning workshop in which we had small groups work on a Bolton College planning problem. Finally, we had group discussion of a fairly complex case, the Carter University Case, which posed some interesting questions concerning University planning and organization for planning.

In subsequent sessions we made several significant changes:

1. We substituted the Ohio Board of Regents material for the Steiner and Ackoff readings. The Ohio Regents material is more basic and it is designed specifically for planning in Universities. This planning manual tended to be too long (and overly repetitive) for our purposes so we condensed the reading material from approximately 70 pages to 25 pages.
2. Our planning workshop exercise generated a worthwhile experience in group problem-solving but it didn't provide enough actual planning experience. We decided to hold the problem-solving exercise off for use later in the program and we designed a substitute exercise involving alternative futures. This exercise worked quite well in that it focused on the importance of forecasting and planning assumptions and it provided an opportunity to discuss contingency planning. In our current format, we trace the development of our formal planning effort over the past eight years. We place significant emphasis on our current planning posture with specific discussion on the use of a financial planning model as a tool being used to assist us in our planning.
3. We have discontinued the use of the Carter University case because of the time required for preparation. The case itself tends to be overly detailed and confusing for our purposes. We attempted to rewrite and condense the case but we finally decided that we could cover the same points more effectively by using our own university as the "live case". We have not used the exercise in our recent sessions, however, because of our general shift in emphasis to our actual planning experience and practice at Boston College.

UNIT #5

ACADEMIC ADMINISTRATION

Unit Leaders:

This is a two-part session with two leaders:

Part A: Rev. Charles F. Donovan, S.J.
University Historian

Part B: John J. Neuhauser
Dean, School of Management

Purpose of Session:

To review the history of Boston College through the eyes of our distinguished historian and former teacher, dean, academic vice president, senior vice president and dean of faculties.

Against this historical background, to explore and discuss current issues and problems in the academic area from the points of view of the faculty, the student body and the administration.

Format:

Part A: Lecture and discussion.

Part B: Panel presentation and discussion. The panel consists of a dean, a faculty member, and a student representative from the undergraduate student government. Dean Neuhauser acts as moderator of the panel.

Major Topics Covered:

Part A – History of Boston College

Observation and reflections by Fr. Donovan concerning the history of Boston College and its evolution as an academic institution. Topics include:

1. The Jesuit educational tradition
2. The founding of Boston College
3. The classical A.B. curriculum
4. The move to Chestnut Hill
5. Finance and fundraising
6. 1948-1978: Three decades of fantastic change

Part B – Current Issues in Academic Administration

Panel discussion built around current concerns in the academic area. Specific topics are selected by the panel members on the basis of timeliness and importance. The topics tend to fall into such areas as:

1. Faculty recruitment and development
2. Promotion and tenure
3. Faculty and student roles in academic decision-making
4. Curriculum development

5. Resource allocations, budgets, salaries, tuition
6. Day-to-day problems of students and faculty

Advance Reading Assignment:

1. University Statutes
   Section on Academic Administration

2. "A Cheerful Reminiscence"
   Boston College Magazine, June, 1979
   Rev. Charles F. Donovan, S.J.

3. "Reflections on the State of the University"
   Cushing Villa Document prepared by the Undergraduate Government at Boston College, Fall, 1979

4. Recent issues of the *Heights,* the student newspaper.

Session Experience:

At the outset, the session was designed to focus on the role of the Academic Dean in terms of the academic and management aspects of the job. We convened a panel of deans from our various schools with the Dean of Faculties as moderator. We asked the Moderator to orient his panel discussion around the element of the management process – to show how planning, organizing, directing and controlling were applicable in the academic sector. While the intent was good, the presentation suffered from repetition as each dean discussed his or her own practice. On the basis of observations and recommendations from our participants, we shifted the focus more towards the role of the academic administrator in dealing with faculty and student problems. The panel was reorganized to include one dean, one faculty member, and one student. As a warmup for the panel discussion, we asked Fr. Donovan to present his interesting presentation on the history of Boston College. Since adopting the revised format, the sessions have been more lively and the seminar participants have engaged in healthy exchanges of ideas, observations, and problems.

UNIT #6

FINANCIAL AND BUSINESS OPERATIONS

Unit Leaders:

John R. Smith, Vice-President of Financial and Business Affairs
James P. Kennedy, Director, University Budgets

Purpose of Session:

To provide an overview of the Boston College financial system with special attention focused on the management responsibility for providing a sound financial base for current operations and future growth.

Format:

Explanation and discussion of financial statements and operations using overhead projection of financial information.

Major Topics Covered:

1. Introductory observations on the organization and role of the division of Financial and Business Affairs
2. Review and explanation of financial statements and fund accounting
3. Financial operations
4. Boston College financial situation
   a. Historical data
   b. Current condition
   c. Future projection
5. Capital budgeting – sources of funds for capital improvements
6. The capital budget and long-range financial planning
7. The annual budget process

Advance Reading Assignment:

1. "Higher Education and the National Economy"
   Planning for Higher Education, June, 1975 William G. Bowen
2. "The Role of a Business Officer in Managing Educational Resources"
   N.A.C.U.B.O. Professional File, December, 1971.
   William G. Bowen
3. "Financial Management in Higher Education"
   Dr. Frank B. Campanella Internal Paper

Session Experience:

In our original program format, we had scheduled two sessions for financial management in higher education:

Financial Management I – Basic
Financial Management II – Applications

Our objective was to use the first session to teach some basic accounting principles, including key concepts, definitions, financial statements, the accounting cycle, fund accounting, etc. We asked a well-qualified faculty member from the School of Management to design and teach the session. He assigned the Robert Anthony programmed learning text, "Essentials of Accounting" as advanced reading. We hoped that this background in basic accounting would position our participants better to understand and appreciate the follow-up session on financial management at Boston College. We realized that we were setting a formidable goal in attempting to teach a course in basic accounting in one 4½-hour session. However, we felt that the programmed learning text would help a great deal and we had an effective teacher. After six sessions and several modifications, we were forced to conclude that we were attempting to do too much. We finally decided to drop the basic session and offer a course in this area as part of our advanced management development program.

In our current configuration, therefore, we have a single session in the financial management area. We have incorporated some of the explanatory material from the previous session. The finance session now provides more of an overview of the financial function. We have concluded that this is more realistic for a basic level management development program.

UNIT #7

ENROLLMENT MANAGEMENT

Unit Leader:

John J. Maguire, Dean of Admissions, Records, and Financial Aid

Purpose of Session:

To introduce and discuss the emerging concept of enrollment management and to place it in perspective in terms of University planning and decision-making. More specifically, to show how enrollment management involves the integration of recruitment, admissions, financial aid, and record keeping to insure a steady supply of students through good times and bad.

Format:

Lecture, explanation and discussion of exhibits, case discussion.

Major Topics Covered:

1. Explanation of Enrollment Management Concept
2. Coordination of admissions, records, and financial aid, and organizational response
3. Goals of the Enrollment Management Program
4. Admissions Marketing Program
5. Coordination of research and information flow
6. Projecting student demand
7. Financial Aid Strategy at Bolton College – Case discussion
8. Retention program
9. Case discussion – Wellman College
10. Enrollment Management checklist

Advance Reading Assignment:

1. Case Study: *Financial Aid Strategy at Bolton College*
   Boston College Admissions Group
2. "To the Organized, Go the Students"
   John J. Maguire
3. "Enrollment Management Checklist"
   John J. Maguire
4. Case Study: *Wellman College (B)*
   Harvard Business School

Session Experience:

This session has been consistently well received by our participants. Dean Maguire is a thoughtful and enthusiastic leader in the area of enrollment management. He makes excellent use of exhibits in his presentation and, in so doing, exemplifies the research orientation of his own staff. He uses an interesting technique to capture the interest of the group. He begins by defining enrollment management and breaking it into eight major questions. He then takes a vote to determine which four questions the group wants him to cover. He has eight sets of transparencies and he proceeds to use the four sets that relate to the four questions selected by the group.

We have not made significant changes in this session. Dean Maguire continually updates his material. The cases stimulate excellent discussions and exchanges of views. In our last session, the Admissions Office designed a simulated admissions exercise involving application evaluation, small group decision-making, and general discussion of the factors involved in the admissions process. This was a very effective way to introduce our seminar participants to the inter-related issues involved in the admissions aspect of enrollment management.

At present, we have no plans for changing the format or substance of this session.

UNIT #8

MANAGEMENT INFORMATION SYSTEMS

Unit Leaders:

C. Peter Olivieri, Faculty Member, School of Management
Bernard W. Gleason, Director, Management Information Systems
James Kidd, Director, Computer Center

Purpose of Session:

To introduce the systems approach and to show how an effective management information system can support management in planning, controlling, and decision-making.

Against this background, to describe the current management information system at Boston College including an introduction to the Computer Center facility and services.

Format:

Lecture, demonstration, problem-solving exercise, tour of Boston College Computer Center. (It should be noted that this is scheduled as an all-day session in order to provide the necessary time for coverage of material, demonstrations, Computer Center tour, etc.).

Major Topics Covered:

1. The systems approach and systems analysis
   a. An overview of systems
   b. Classification of systems
   c. Managing and feedback
   d. General model of the MIS
   e. Definition of an information system
   f. Types of information
   g. The role of the computer
   h. The integrated MIS

2. The Boston College MIS
   a. An overview of the data base
   b. Data base management
   c. Key University data bases – with demonstrations
   d. Where we are and where we are going

3. Brief introduction to some computer terminology

4. The Boston College Computer Center
   a. What we do and what services we provide
   b. Tour of campus facility

Advance Reading Assignment:

"Management Information-decision Systems"
G. A. Dickson

Session Experience:

In planning the MIS session, we felt that it would take more than one four-hour session to cover the concepts and applications in this area. We decided to expand the session to a full day in order to provide adequate time. We realized, however, that this is not always the most exciting material to try to teach, and a single session could lead to some attention-span problems. However, we were fortunate to get the service of a gifted faculty member from the School of Management. Professor Olivieri has a genuine talent for teaching the concepts in a manner which is interesting, informative, and, at times, humorous. Our directors of MIS and the Computer Center follow up with good descriptions of the Boston College applications, with examples, demonstrations, and some hands-on experience. All three of the session leaders are well-informed and enthusiastic spokesmen for MIS. We believe that this is an important aspect of the session since it encourages people to ask questions and discuss problems. In this regard, most particularly, the session has been successful in breaking down some communication barriers and in removing some of the misunderstanding and apprehensions of our participants.

UNIT #9

UNIVERSITY RELATIONS

Unit Leaders:

James P. McIntyre, Vice-President of University Relations
Paul J. Hennessy, Director of Communications
Karl Salathe', Director of Development
John F. Wissler, Executive Director of the Alumni Association

Purpose of Session:

To provide an overall orientation to the University Relations function and to discuss the important activities and relationships of the alumni, communications, and development units as they interact with our internal and external publics.

Format:

Lecture and discussion, role play, video

Major Topics Covered:

1. Introductory observations on the organization and role of University Relations.
    a. Key functions
    b. Interrelationship of functions
2. Alumni Relations
    a. Developing alumni support
    b. Alumni Association and programs
3. Communications
    a. Public relations and communication
    b. Strengthening internal communication
    c. Boston College and its external image
4. Development
    a. The art of fund raising
    b. Targeting approaches toward different constituencies: alumni, corporations, foundations, parents and friends.
        (1) Special group focus
        (2) Estate planning
    c. The successful "New Heights Advancement Campaign"
    d. Future directions
5. Fund raising role play exercise
6. Boston College on television

Advance Reading Assignment:

1. Excerpts from "Development Program for Boston College for 1980-81"
   Internal document
2. Boston College: A Report of Boston College 1977-1980
   Internal document

3. Current issues of Boston College Publications
    - Boston College Magazine
    - Boston College Bi-Weekly

Session Experience:

Our initial design of the MDPI Program did not include a session on University Relations. This was so because of our desire to utilize a management process approach rather than a straight organization-description approach. However, in their program evaluations, our participants noted the lack of coverage in this area. They registered a strong interest in learning about the university relations area, in general, and, more specifically, the fund raising activity. In response to these recommendations, we incorporated a separate unit on University Relations as an add-on session in our advanced MDPII Program. These sessions were well received and we have recently revised our MDPI program format to include this as a unit in the basic program as well.

It is significant to note, in this regard, that as our program progressed, we received strong evidence from our program evaluations that the most beneficial aspect of the program was the broadened awareness and knowledge of university functions and personnel. With this feedback, we have been less hesitant to provide more coverage of the key operating areas and key management personnel in these areas.

UNIT #10

BEHAVIOR IN ORGANIZATIONS

Unit Leaders:

Edgar F. Huse, Faculty Member, School of Management
John A. Lewis, Faculty Member, School of Management

Purpose of Session:

To review some current concepts of human behavior and to examine their application to the manager in terms of his or her individual behavior, group behavior, managerial style, leadership role.

In addition, to recognize the importance of human behavior in designing the structure of work – motivation, communication, human needs, power, the informal organization.

Format:

Lecture, individual and group exercises, role play, questions and discussion.

Major Topics Covered:

1. Census of Issues: Introductory exercise to identify problem areas to be covered in session
2. Perception and management
    a. Assumptions and Inferences Exercise to show that we often confuse "fact" with "inference"
3. Motivation to work
    a. Need cycle
    b. Maslow's Need Hierarchy
    c. Need achievement
    d. Three Social Motives Exercise
    e. Group task exercise – building squares
4. Leadership style
    a. Leadership Questionnaire
    b. Concept of leadership
    c. Leadership grid
    d. Clean the Tank Exercise
    e. Transactional analysis
5. Work planning and review
6. Interpersonal communication

Advance Reading Assignment:

1. "Team Development: Will it Work for You?"
    Personnel, July-August 1975
    John Lewis, III

2. "Eclectic Approach for Organization Development"
   Harvard Business Review, September-October, 1971
   Michael Beer and Edgar F. Huse
3. "One More Time: How Do You Motivate Employees?"
   Harvard Business Review, January-February, 1968
   Frederick Herzberg
4. "Increasing Management Effectiveness Through Work Planning"
   Edgar F. Huse

Session Experience:

This session on human behavior has undergone significant change since the inception of the program. In our initial program, human behavior was covered in two sessions. It was included in a session on Organization which came early in the course sequence and it was the major topic in a separate session on interpersonal relations. In our planning, we felt that these were two separate and important dimensions. However, in practice, our participants observed that there was a significant overlap of the material and recommended that the two sessions be redesigned into a single session on human behavior. Professors Huse and Lewis redesigned their offerings into a single session which has worked out quite well. This is an area in which many of our MDP participants have had prior academic study – but usually with a different orientation. As a result, there is a tendency to have some more sophisticated (critical) evaluations, particularly from participants who work in the counseling and student affairs areas.

When we changed the session, we scheduled it as part of the Human Resources area, near the end of the course sequence. Many of our participants then suggested that this entire session be moved up early in the sequence because the exercises generated a healthy degree of group interaction. It was felt that the experience would help in the socialization process at the outset when people were not well-acquainted with one another. We have experimented by moving the session up to the second spot in the sequence but we are not entirely comfortable with it there. In terms of the subject area, it fits better in the Human Resource area. Our problem seems to be in the early sessions themselves where there tends to be more lecture than group participation. With this in mind, we plan to make some revisions in the sessions on Governance and Planning to utilize additional group discussion of cases and exercises.

UNIT #11

MANAGEMENT IN STUDENT LIFE AREAS

Unit Leader:

Kevin P. Duffy, Vice-President of Student Affairs

Purpose of Session:

To consider the application of a sound management approach to the total operation of student affairs and to emphasize the importance of planning and policy setting as the key management philosophy underlying effective operation of all aspects of student life.

Format:

Lecture and discussion, small group discussion of cases, general discussion of group decisions, summary observations.

Major Topics Covered:

1. Introductory comments concerning the purposes of the Student Affairs area within the University's mission
   a. An integrated plan for student affairs
   b. A management model for student affairs – Harpel model
   c. Programs and activities within Student Affairs

2. Education Outside the Classroom at Boston College
   a. Education of the Whole Person
   b. Jesuit Tradition
   c. Holistic philosophy of education
   d. Some key student development concerns
   e. A student development view of education at Boston College

3. Decisions in the Student Affairs area – small group discussion of the individual group decisions
   a. Case #1 "But Where Will I Sleep"
   b. Case #2 "Recognition of a Student Organization
   c. Ten Simple Decisions – The cases may vary from session to session depending on the current situation. The groups normally handle two cases. In a recent session, the "Ten Simple Decisions" approach was used in place of the two cases. This approach gave a broader appreciation of the kind of decisions that are handled in the student affairs area.

4. Summary observations: What makes a University work

Advanced Reading Assignment:

1. "Boston College: Goal for the 1970's"
   University Academic Planning Committee

2. "Planning, Budgeting, and Evaluation in Student Affairs Programs: A Manual for Administrators"
   National Association of Student Personnel Administrators
   Richard L. Harpel, 1976

3. "The Case for Catholic Education"
Commonweal, January 21, 1977
Richard P. McBrien

Session Experience:

This session has been very effective and we have had very little cause to make significant changes. The format includes a philosophy of student affairs, the application of the management process to student affairs programs, some lively case discussion of real problems in the area, and a personal summary of the key pressure points and operations of the student affairs within the total university environment. The presentation is well-planned and there is sufficient participation to stimulate attention and interest. The use of current problems as live cases for decision-making adds a great deal to the effectiveness of the presentation. In an early approach, the presentation was highly descriptive, focusing mainly on the various functions within the Student Affairs area. The revised format has been much more effective in terms of our program objectives and in terms of participant interest. This, however, points up a problem which we face in utilizing internal session leaders. All too often, the session leader is more comfortable describing his own area – who does what? While it is appropriate to provide some descriptive information, it can be overdone. This session represents a good example of an approach which combines some description, some teaching and some application through group participation in case situations.

UNIT #12

UNIVERSITY PERSONNEL RELATIONS

Unit Leader:

Leo V. Sullivan, Director of Personnel

Purpose of Session:

To provide a comprehensive view of the University's personnel function and to explore in some depth some of the more important areas such as performance evaluation, wage and salary administration, labor relations, job classification and description, affirmative action.

Format:

Lecture, questions and discussion, film, "live case" discussion

Major Topics Covered:

1. Introduction to the Boston College Personnel function
    a. Organization and staffing
    b. Services

2. The Personnel function . . . whose responsibility is it?
    a. Role of the personnel administrator
    b. Role of the manager

3. A joint effort for developing manager skills in some key areas:
    a. Recruiting, screening, interviewing, selecting
    b. Supervising, motivating and developing subordinates
    c. Performance appraisal and development planning
    d. Handling problem employees
    e. Career planning

4. Group discussion of "live cases" or problems in personnel. Some of the areas include:
    a. The 9 to 5 effort to organize the office and clerical staff
    b. Performance appraisal and promotion – a filmed case
    c. Contract negotiation with service employees' union
    d. "The Revolving Door" – A Bolton College case on affirmative action
    e. Western University Case – a proposed plan for instituting a merit system of compensation
    f. Men, women, and life annuities
    g. Establishing a grievance procedure

5. Improving employee performance through effective use of performance appraisals
    a. Do's and don'ts of performance appraisals
    b. Appraisal ethics
    c. Conditions favoring improvement

Advance Reading Assignment:

1. "Performance Review – A Mixed Bag"
   Harvard Business Review, July-August, 1973
   George A. Reider
2. "The Expanding Role of the Personnel Function"
   Harvard Business Review, March-April, 1975
   Fred K. Foulkes
3. Performance Appraisal Guidelines
   Internal documents

Session Experience:

As we approach the end of the MDPI program, the substance of the sessions becomes more specific and more skills-oriented. In the Personnel session, therefore, the focus is largely on the "how to" aspect of the manager's job. The session emphasizes the importance of establishing a good working relationship between the manager and the personnel administrator. Many of the important management concerns – hiring, promotion, performance appraisal, compensation, problem employees, etc. – are joint responsibilities. With this point of view, the Personnel session operates largely as a workshop to explore and discuss problems and practices involved in supervision of subordinates. Some of the topics are introduced by the Unit Leader. Some are presented in the form of "live cases" or prepared cases. Some are problems raised by the seminar participants. These sessions have generated a healthy climate of give-and-take and a clearer understanding of effective personnel practices and procedures. In all of the sessions, a significant emphasis has been devoted to performance appraisal since this is an area of current concern to all of our management personnel.

UNIT #13

PLANNING & CONDUCTING EFFECTIVE MEETINGS

Unit Leader:

Ray Keyes, Faculty Member, School of Management

Purpose of Session:

To explore a specific skill area which will be helpful in making the individual manager more effective in the performance of his job. This is a "how to" session which gives participants a preview of the kinds of sessions that would be available in the follow-up MDPII program.

Format:

Lecture, exercises and discussion, meeting role play and discussion.

Major Topics Covered:

1. Introduction to meetings
    a. Why study meetings?
    b. Kinds of meetings
    c. Important dimensions of meeting situations
2. Poor meeting – good meeting
3. What makes a good meeting?
4. Elements of a good meeting
    a. Planning
    b. Preparation
    c. Conducting the meeting
    d. Meeting results
5. Meeting Role Play
6. Common Pitfalls

Advance Reading Assignment:

1. "Member Roles in Meeting Situations"
   Internal paper
2. "Do These People Attend Your Meetings?"
   Internal paper
3. "The Confrontation Meeting"
   Harvard Business Review, November-December, 1969
   R. Alec MacKenzie

Session Experience:

This session of meetings is run on the morning of the last day of the program. We schedule a full day for this last meeting to allow time for a substantive unit, a program summary, group evaluation, and a social hour.

The meeting on meetings is an informal, participative session. At this point in the program, our participants are relaxed with one another and with the unit leader. The exercises stimulate some effective group learning and the role play works quite well in dramatizing the problem situations that arise in meeting situations. We have had excellent experience with our role players. The situation generates some healthy opportunities for humorous exchanges. The "esprit" that we work to accomplish in the program is evidenced in the friendly give-and-take of the role play. It is perhaps not accidental that the subject of meetings leads to a successful concluding session. For most people in the university environment, meetings are an important and often frustrating part of their day-to-day lives. When we ask people to describe a particularly poor meeting they have attended, the descriptions are simply marvelous.

This unit, therefore, serves a useful purpose in handling a specific skill area while, at the same time, it is an effective lead into our final unit.

UNIT #14

PROGRAM SUMMARY AND CONCLUSION

Unit Leaders:

Frank Campanella , Executive Vice President
Ray Keyes , Faculty Member, School of Management

Purpose of Session:

To provide a program summary which synthesizes the key elements from the individual sessions into a total management process frame of reference.

To review planning, and to discuss the University strategy for survival in the threatening years ahead.

Finally, to encourage an open exchange of observations, ideas, and suggestions for improving the Management Development Program.

Format:

Lecture and discussion, small group evaluation meetings

Major Topics Covered:

1. General review of topics covered in the program
2. Synthesis: "The Management Process in 3-D"
   a. *Harvard Business Review* reprint, November-December, 1969
   b. Discussion of diagram showing the activities, functions, and basic elements of the manager's job
3. The Planning Process
   a. Schematic
   b. Review and discussion
4. Observations concerning the future climate for higher education
   a. Strategy for survival
5. Concluding remarks
6. Small group meetings with program planners to discuss program effectiveness.

Session Experience:

This final session introduces some sober thoughts about the future of higher education. It helps to place the Boston College management effort in perspective in terms of the commitment that we have not only to survive in the difficult years ahead but to grow stronger.

We also use the last hour of the session to have discussions with the seminar participants concerning the Management Development Program itself. What parts are most beneficial? What areas need improvement? What subjects should we incorporate in a second level program? These discussions supplement our written evaluations and tend to bring out some points that aren't always considered in the formal evaluations.

As a final gesture, we hand out Certificates of Completion to our participants (Appendix A 4). This is done in a semi-serious vein. The certificates and the "Management in 3-D" diagram often appear on office walls subsequently.

The wind-up social is an enjoyable way to end on a relaxed note. We invite all past participants and session leaders to join us. This mixer provides a good opportunity to expand the socialization process which is one of the objectives of our program.

Some Effective Materials:

In the previous section, we have identified the various readings and teaching material used in the units. It isn't practical to include all of these materials in the report appendix nor do we necessarily recommend these materials for use in other programs. In developing our program, we felt that it was important to encourage each session leader to select appropriate advance reading materials and, where possible, to design the teaching tools (cases, exercises, etc.) to meet his or her specific objectives. We feel that this involvement, particularly in the design of the Bolton College cases, provided an individualized dimension to the program which contributed significantly to its success. Our participants identified readily with the problems and decision situations which were incorporated in our self-designed, University-oriented teaching materials. When we used these materials, we generated a high level of interest and participation. We strongly recommend that other schools design and develop cases and exercises for their programs which relate to their immediate situations. To assist in this effort, we are including in the appendix some examples of cases which we designed specifically for our program. The appendix items include the following:

Appendix B 1 – The University of Bolton College

Our initial piece is a description of Bolton College which is used in the early session on Organization, Functions, and Relationships. This thinly disguised "case" allows us to present the actual facts and figures which everyone recognizes as belonging to Boston College. (Our choice of the name Bolton College stemmed from the practical realization that we would only have to change one letter in order to use existing charts and exhibits of Boston College). We found that this initial presentation and discussion of the current numbers contributed significantly to our credibility and established a good foundation for subsequent segments of the program.

Appendix B 2 – Bolton College Executive In-Basket

The executive in-basket is used at the end of Unit #2 to stimulate participant interest and interaction. The in-basket items have been designed in a simplified form to reflect the kinds of problems which are directed to the Office of the Executive Vice-President. The in-basket exercise serves as a good introduction to institutional problems, an effective medium for discussing university organizational relationships and resources, a practical exercise in priority-setting and, finally, an interesting mechanism for stimulating group participation.

Appendix B 3 – Planning Workshop

This exercise was designed to activate the session on University planning. Much of the material on planning is descriptive and most of our participants have had little direct experience with a formal planning process. With this in mind, we wanted to put them in a situation in which they would have to actively think about assumptions, forecasts, University goals and major programs. The exercise presents two sets of alternative futures. Given these possible conditions, the participants work in small planning groups to determine what changes they would make in University goals and major programs to respond to the conditions. The exercise generates a heightened awareness of external conditions as they relate to University planning and decision-making.

Appendix B 4 – Financial Aid Case

This case was prepared as an advance assignment for Unit #7. It serves to raise some significant questions concerning alternative approaches for allocating financial aid. The case has been effective in establishing a good basis for discerning the complexities involved in establishing a financial aid strategy.

Appendix B 5 – MIS Workshops

This case was designed to dramatize the importance of accurate, timely information as it relates to a significant problem area in the University.

Appendix B 6 – Student Affairs Cases and Decisions

The functions and problems in the Student Affairs area have been effectively presented through the medium of "live cases" and current decision situations. These actual decision situations have generated healthy participant involvement and discussion.

Appendix B 7 – The Revolving Door

This case was developed for use in the Personnel segment as a basis for discussing problems in the Affirmative Action area.

Appendix B 8 – Meeting Role Play

This exercise was designed to highlight the typical problem situations that develop in meetings. It can best be described as a "directed role play." It accomplishes its purpose in depicting problems while, at the same time, it generates a high level of spontaneous humor. It is a good exercise for the last unit where people are relaxed with one another. It helps us end on a high note.

SECTION IV

PROGRAM EVALUATION

On-Going Evaluation:

In this section, we will discuss our efforts to establish and maintain the quality of our Basic Management Development Program (MDPI) through an on-going approach for program evaluation and change. At the outset, we agreed on the importance of incorporating various mechanisms for evaluating the effectiveness of the program. Our objectives were twofold:

- First, we wanted to get participant feed-back to supplement our own observations concerning the overall effectiveness of the program in relation to our program objectives.
- Second, we wished to identify those program areas which were effectively designed and presented and, more particularly, those areas which required further attention in terms of content and delivery.

Towards these ends, we used four approaches for measuring and monitoring our progress:

1. Direct observation
2. Written evaluation
3. Group discussion
4. Supervisor survey

Each of these approaches provided valuable information to assist us in updating and improving program content and presentation. We will discuss each of the approaches separately:

1. *Direct Observation:* Certainly, one of the most important sources of information came from the direct observations of the program designers; Campanella, Keyes, and Sullivan. We made the commitment to become actively involved as observers at each of the sessions during the first year. In addition, we continued to meet regularly to discuss our observations and experiences, and to make necessary changes. We feel that this initial interest and involvement of the program designers had a great deal to do with the early success of the program. As a result, session leaders were conscientious in their preparation and the participants were equally conscientious in their attendance and participation. Moreover, this first-hand experience positioned us to respond quickly and effectively to the various problems which arose concerning program content, teaching methodology, and logistics.

After the first year, as we became more confident in the success of the program, we cut back on the direct participation of Campanella and Sullivan. It simply wasn't realistic or necessary to require a significant segment of time each week by these top University administrators. We agreed, therefore, that Campanella and Sullivan would continue to participate in the opening and closing sessions and in the sessions in which they were session leaders. They would also drop in from time to time for lunch or to observe a new session or a new exercise. Keyes, on the other hand, as faculty coordinator of the program, would continue to attend all sessions and act as the quality-control person. It is important to emphasize the role of the faculty coordinator in relation to this evaluation dimension. By attending each session and by establishing good working relationships with the session leaders, many of the necessary changes and improvements were made with a minimum of misunderstanding. We have found that our session leaders and our seminar participants have reacted positively to the continued presence and interest of the coordinator. And we are quite convinced that this presence provides an effective vehicle for quality maintenance and on-going communication.

The program coordinator also maintains an individual file for each of the units in which he retains copies of session outlines, readings, exercises as well as his own notes. These files are useful to have as a record of previous presentations and as a basis for discussing possible changes and improvements with session leaders.

2. *Written Evaluation:* When we selected the initial classes of participants, we picked people who would be constructively critical. In our letter of invitation, we stated the following:

> "One element that influenced your nomination is your ability to be openly critical (in the good sense of that word). We would like to rely on your honest and critical appraisal of each class, its presentation, the materials used, etc., in order to revise and improve the program for the classes that will follow next year."

In order to facilitate this appraisal, we developed a detailed program evaluation form for them to use in making criticisms in the following areas:

1. Program objectives
2. Program units (this involved a separate evaluation of each of the fourteen units)
3. Assignments – quality and quantity of work
4. Program logistics
5. General recommendations

Our participants were conscientious in completing these rather long, detailed forms and their observations and recommendations were extremely useful. These written comments confirmed our own observations in some areas and pointed out additional problems and gaps which we were not aware of. These detailed evaluations were particularly important to us in the initial stages of the program but, as time went on, we realized that the unit-by-unit evaluation was difficult to prepare and rather cumbersome to process. As a result, we revised our form to simplify the evaluation of the separate units on a rating scale with room to comment on selected sessions identified as being "excellent" or in "need of improvement." In its current form (see Appendix C 1), the evaluation form seems to work quite well. It highlights the important areas and provides adequate opportunities for comments and suggestions.

3. *Group Discussion:* It has been our experience from past situations that small, informal group discussions often provide an added dimension to the evaluation process. With this in mind, we incorporated group meetings as part of our final session. This is actually the last thing that we do in the program. We break out into groups of six or seven people and we give them these broad questions to discuss:

   a. What did you find to be most beneficial to you in the MDPI program?
   b. What did you find to be least beneficial?
   c. What areas would you like to have covered in follow-up sessions as part of an advanced MDP program?

   The groups meet separately for approximately 45 minutes to discuss these questions. At the end of these separate meetings, we meet as a total group to discuss the results of the group discussion with the faculty coordinator. On every occasion, these group meetings have been positive and useful. The exchange of observations helps to show whether a problem is an isolated reaction or a more general problem. The open discussion of the strengths and weaknesses of the program sparks off some excellent ideas and recommendations – which get immediate group reaction. In every instance, this group evaluation experience has provided a very positive, constructive conclusion to our program.

4. *Supervisory Survey:* In the fourth year of the program, we decided to survey our senior supervisory personnel to determine whether they were experiencing positive results from the MDPI program. Ideally, we would have liked to determine whether there was any positive correlation between subordinate participation in the program and subsequent performance on the job. Realistically, however, we recognized the difficulty in attempting to measure job performance and/or to attribute it to a specific program or learning experience. Our survey, therefore, was designed to elicit comments concerning program objectives and strategy, program performance, and program impact. The results of the survey were overwhelmingly positive (see Appendix C 2 for a copy of the questionnaire and C 3 for the survey of the results). The general flavor of the response is best captured in the comments contributed in response to our question on "program impact":

   "Overall, positive impact on my people – benefit realized depends on the individual initiative supplied by the people participating – overall benefits have been and continue to be very valuable."

   "Most useful contribution has been the greater knowledge of the university."

   "Major impact has been the acquisition of a broad knowledge of university functions and the people contact."

   "MDP combats myopia and fosters university-wide perspective."

   "The opportunity to spend an afternoon and an evening reflecting with the President, to spend the equivalent of a couple of days with the Executive V.P., and hear someone such as Peg Dwyer share first-hand observations on the operations of the President's Office and the Board of Trustees – these are unique opportunities which most middle management administrators would never otherwise have."

"Hard to measure but alumni of MDP have a greater understanding of their own role in relation of the goals and objective of the university."

"One of the greatest benefits has been the opportunity to meet peers from other functional areas."

"I believe a major reason for the Program's success is that we have not brought in "outside experts" but have relied on our own considerable talent, people who know first-hand what they are talking about when talking about B.C."

"Program has become a focal point for a certain esprit de corps among former participants – it fosters greater professionalism."

As an added point of interest, when we reported the results of the survey to the President and Vice-Presidents, we took the opportunity to respond to another question that had been raised about the time commitments required by the program, particularly on the part of senior executives who taught individual sessions. There was some concern related to the fact that most directors and key middle managers had completed the program in the early stage. From our point of view, however, the program would lose a great deal of its impact and credibility if our senior executives were "too busy" to participate. We weren't at all sure that our top executives really appreciated the significance of their participation. Therefore, we went through the participation evaluation forms from the previous four sessions and extracted the comments that were made on President Monan's presentation (see Appendix C 3). These comments were highly complimentary, yet, in a broader sense, they were extremely effective statements concerning the importance to our middle management people of this senior executive interest and participation. When our senior executives had the opportunity to read these comments, they agreed that the time was well spent.

Results of the Program Evaluations

The previous paragraphs discuss the various approaches that we have used to evaluate the program. It wouldn't be particularly helpful to try to provide a detailed description of results of these evaluations. However, there are some broad observations that we can make from this experience that might be useful.

1. *Broadening Perspective:* By far, the aspect of the program to be identified as most beneficial concerned the broadening of knowledge of university functions and personnel. In both participant evaluations and supervisor comments, this point was made. It reflected on the formal program content and the informal aspects as well. People appreciated the opportunity to interact with other managers from different operating areas.

2. *Management Skills:* Participants also observed that they developed a better appreciation of the task of managing a large, complex institution. They did not always recognize the importance of the management process, as such, but they did comment favorably on specific aspects of planning, decision-making, and control.

3. *Personal Skills:* Most people recognized that the basic program was not designed to develop personal, job-related skills. However, they observed that advanced level programs should provide more skills training for application to their immediate jobs.

4. *Program Participation:* Participants were generally critical of sessions which did not provide some opportunities for active participation. Some lectures were well received, but for the most part, the participants were uncomfortable in sessions which did not provide opportunities for healthy exchanges of ideas, observations, criticisms, recommendations. A model which was well received generally began with a more formal delivery of substantive material in the first half of the session followed up by cases, exercises, group discussions, or some other mechanism for generating group involvement and exchange.

5. *Timing of Meetings:* We received immediate, negative feedback on our initial schedule of late afternoon/evening meetings. For many of our managers, evening and Saturday meetings caused direct conflict with their job responsibilities as they related to school activities. We also found that we created problems for some managers if we extended sessions late in the academic year, approaching graduation. No time is perfect for everyone but it is important to be sensitive to the college calendar and specific high-pressure periods in planning the schedule.

6. *Assignments:* A few people found the advance readings assignments to be excessive but most felt they were valuable. Some people resented it if the readings were not directly related to the session itself.

7. *Financial Management:* Our efforts to try to teach some basic accounting and financial concepts were not well received. Some of our participants had good backgrounds in the area and they were bored with the basic approach. Many others had no background in accounting and finance and they were lost. It was generally observed by the participants that the financial area should be covered in depth in separate, multiple-session programs designed specifically for persons without accounting and financial training.

8. *Individual Sessions:* The evaluations were rather specific concerning weaknesses and problems in particular sessions. These critiques provided valuable observations and recommendations which led to specific changes and improvements in program coverage and in seminar teaching approaches. In addition, the positive observations were helpful to the program coordinator in that they provided the basis for encouraging our best session leaders to continue in the program.

The program evaluations provided an important source of information to assist us in developing our own conclusions concerning the aspects of the program which worked well and those which were less effective. The next section will discuss some of our major conclusions from our experience with the design and conduct of this program.

SECTION V

PROGRAM CONCLUSIONS

Purpose:

This section has been written primarily to assist other planners to learn from our five years' experience in the design and development of a basic level management development program. While our observations and conclusions are drawn from our own particular experience, we believe that they can be broadly applied to situations in a variety of institutions. It is our purpose in this section, therefore, to discuss some things that worked well and some that didn't work as well. We will present our findings within the framework for planning decisions presented in Section II utilizing the following areas:

1. Program Objectives
2. Program Participants
3. Program Content
4. Program Methods
5. Program Logistics
6. Program Schedule

A final segment will present our summary conclusions concerning the key factor for success in the program.

Program Objectives:

As we review our actual results against the objectives that we established in the planning stage, we would venture conclusions in the following areas:

1. *Statement of Objectives:* Our original statement of objectives proved to be somewhat optimistic. While we did provide effective coverage of tradition and goals, university functions and relationships, management process and applications, and human behavior, we did not succeed in our efforts to *study* financial management in higher education. It is more accurate to say that we discussed some of the current plans and developments in the finance area. Also, in our supervisor's survey, it was noted that our statement of objectives didn't really recognize the importance of student-centered thinking in university administration.

2. *Professional Management in the University:* We conclude that the management development program does, in fact, provide a visible commitment to improving management performance. The participation of senior management in the program provides a clear statement concerning the importance of management development.

3. *University Perspective:* As described in the previous section, the outstanding accomplishment of the basic level program appears to be in the expansion of our middle-manager's knowledge and experience beyond the day-to-day responsibilities of the job. The program is quite effective in broadening perspective and it does generate an esprit that results from this broader contact with managers in other university areas.

Program Participants:

1. *Middle Management Focus:* We conclude that the program is appropriately directed toward the middle management level. While we had some thoughts initially that the program could be beneficial for some of our executive level personnel, we find that it is more effective to involve these senior managers as session leaders. To some extent, this involvement is a learning experience for them as well.

2. *Heterogeneous Mix:* On the basis of program participation as well as participant reaction, we feel that the careful composition of heterogeneous groups was an important factor in the success of the program. This works because we are conscientious in developing the groups with representatives from all of the major functional areas.

3. *Nominating Procedure:* For the most part, the Vice-President nominating procedure works well as a basis for developing the broad pool of candidates. However, in order to maintain flexibility in designing a good mix, it is important to be able to assign people to either the Fall or the Spring session. In the same vein, it is important to maintain a policy of continuing the program on an open-ended basis as long as there is sufficient interest. This policy helps to eliminate an "elitist" image of the program. It also enables people to plan their attendance to conform to their work schedules. In all instances, we would stress the importance of having the Vice-President or Director discuss the nomination with the candidate beforehand to determine whether there are any serious work problems or schedule conflicts. In a few instances, we had initial attitude problems with candidates who were nominated through their vice-presidents without prior notification or discussion. This procedure may create an "order-to-attend" rather than an "invitation-to-attend" appearance.

4. *Initial Group Selection:* In our initial sessions, we were careful to select some of our best managers, people who would be confident and constructively critical. This strategy worked well in that it did provide us with valuable observations and recommendations and it turned out some enthusiastic emissaries for the program. However, as we proceeded with the program, making necessary changes and improvements, we began to worry that our best offerings had not been presented to some of our best managers. We conclude, nevertheless, that the constructive contributions of these people at the outset was more important than their exposure to our best efforts.

5. *Changing Nature of the Group:* Understandably, as we reached year #4 and #5, we observed that the nature of the group changed somewhat as it was composed of newer managers and managers with lower level responsibilities. Group participation was not as relaxed and spontaneous and the general atmosphere was more tense and formal. In exploring this phenomenon with participants, it was clear that there was

no lack of desire to participate but rather an understandable hesitancy related to lower levels of self-confidence and experience. In recent sessions, our leaders have been apprised of this situation and encouraged to use more creative ways to break down these barriers. For example, we urge our session leaders to use leading questions to stimulate discussion rather than the time-honored, over-used, often ineffective closer: "Are there any questions?"

6. *Faculty Participants:* In recent sessions, we added one or two faculty members to the groups. We had observed that many of our middle managers were unaware of the priorities and concerns of the faculty. Faculty members, in turn, are not generally familiar with the various functions and relationships of our administrative and support areas. The inclusion of the faculty point of view has contributed significantly to our group understanding and the individual faculty members have responded very positively to this opportunity to learn more about the non-academic functions of the University.

7. *Guest Participants:* On a couple of occasions, we have had an opportunity to add manager guests from sister institutions in the area. We had some initial apprehensions that the emphasis on the Boston College environment would be less interesting to managers with other experiences. Actually, this did not appear to be a problem and our guests were enthusiastic participants and interesting contributors.

Program Content:

1. *Broad Program Perspective:* We are reassured that we have a logical organization of our curriculum. There is a good flow from the general to the specific – from University, executive level issues to operational areas to human resource concerns to personal skills development.

   There appears to be a good integration of concepts and applications, plans and decisions, ideals and actions.

2. *Management Process Orientation:* The use of the unifying management process theme is a fairly simple, straightforward way to show the important relationships for planning, execution and control. As theory, this can often be rather dull material to teach or to study. Our goal is to establish the concepts in their minds in the initial sessions and to follow up in subsequent sessions with examples and discussions of live applications in the various areas of the University. We don't expect all of our participants to develop a firm grasp of the concepts but, in varying degrees, we can see a growing appreciation and understanding of these concepts as they relate to real situations.

3. *Specific Content Problems:* At the general level, we are satisfied with the program in terms of growth of knowledge of the University and its functions, relationships, human dimensions, and decision-making processes. In specific areas, we encounter some problems:

   - In the operational areas, we have the urge to present the "here's what we do" in painful detail. This is a natural inclination for operating managers to describe activities as opposed to problems and decision situations.

   - As mentioned previously, we were overly optimistic in thinking that we could provide a "crash course" in accounting and finance in two 5 hour sessions.

- There are some areas which are more challenging to present due to the nature of the material to be covered: e.g. planning, finance, budgeting, management information systems. Although the material to be covered is relevant, it is important to use effective, creative teaching methods to sustain attention.

- Finally, the program does not include much in the way of personal skills development. For some this is a source of frustration since they wish to learn specific things which they can apply immediately to their jobs. We conclude that personal skills development belongs in a subsequent program where it can be designed and tailored to meet the needs of specific groups.

Program Methods:

1. *Internal Orientation:* Our basic decision to use internal people as session leaders and Boston College as the "live case" works out quite well as evidenced by the reactions noted in the evaluation sessions. Concepts and techniques are more interesting and relevant when they are translated into identifiable, real situations. Our participants feel that they learn a great deal about Boston College and its various complexities. Moreover, they develop a healthy appreciation for the functions and problems of other managers and of other operating departments.

   The internal approach also provides some significant benefits in terms of the economics of the program. Utilization of internal people to design and teach in the program leads to significant savings in teaching costs and frees up the funds necessary to conduct all aspects of the program as a first-class, professional activity. This is reflected in our expenditures for meeting facilities, teaching tools, furnishings, lunches, socials, gifts, workbooks, etc. Our participants are genuinely impressed with the quality of the support aspects of the program.

2. *Teaching Problems:* The use of internal "volunteer" teachers is not without some predictable problems. Some of our session managers are simply not effective as teachers. They are often more comfortable in a formal lecture format where they describe and explain but don't interact. It is not always easy to suggest changes to these volunteers or to make substitutions. For the most part, however, we are fortunate in that most of our leaders are covering areas in which they are comfortable and confident. Several have had prior teaching experience. All are cooperative and conscientious. From time to time, there are some variations in the quality of presentations as session leaders respond to the pressures of their job situations. In those instances where we do initiate corrective actions, we are able to do so in a spirit of mutual concern.

3. *Executive Leadership:* If there is one critical factor which contributes to the feasibility and success of our internal approach, it can be found in the leadership and commitment of our senior executives. Where session leaders and participants receive clear signals from the top that this is an important University program, they respond with a corresponding seriousness of purpose and commitment to quality. It is doubtful if this program could succeed without this clear leadership and support from the President, the Executive Vice-President, and the area vice-presidents.

4. *Bolton College Cases:* Appendix B contains examples of cases and exercises designed specifically for use in our program. In their present form, these cases would

not be particularly effective for use in other programs. They do, however, work well for us. We feel that it is good teaching methodology to design and use cases and exercises which relate to the specific topics being presented. We encourage others to design and experiment with their own cases to enhance interest and participation in their programs.

Program Logistics:

As outlined in the previous section, the decision to go "first class" where possible provides an important dimension to the program. It is very important that the program be *perceived* as being worthwhile and professional. In an educational environment, it is all too easy to take the easy approach of using existing lunchrooms, classrooms, and readily available facilities. However, we try to avoid the appearance of a low-budget, low priority operation by using separate facilities on our satellite campus which we have equipped for our own purposes. Certainly, economics have a great deal to do with decisions in the logistics area. In our case, the allocation of funds for first class facilities and support services is offset by our modest teaching costs.

Program Schedule:

In our own situation, we find that a half day session in the middle of the week works well. Twelve weeks seem long enough. It is important to delay starting in the Fall until a month after school begins. It is also best to avoid conflicts with semester breaks, vacations, and the graduation period. Our people were emphatically against evening sessions and week-end sessions. We feel that it is important to respond to these preferences since the receptivity of the participants toward the program can be influenced by our sensitivity to these professional and personal time pressures.

Summary Conclusions:

As we review our overall program experience we can identify several key factors which have been critical to the success of our program. We summarize these factors as follows:

1. Top level commitment, support, and active participation in the program;
2. A well conceived program plan and curriculum design;
3. Boston College as the "live case" and B.C. people as the primary teaching resource;
4. Heterogeneous mix of middle management people;
5. The Professional Approach;
6. Continuing presence of program coordinator;
7. On-going evaluation as basis for program revision and improvement;
8. Genuine enthusiasm of program planners, session leaders, and manager participants;

SECTION VI
FUTURE DIRECTIONS

Introduction:

The previous sections discuss our experience in designing and conducting a basic level management development program which introduces management concepts and considers their applications in the various operations and activities within the University. The program is most successful in improving participant understanding of University goals, operations, management functions, and working relationships. However, the program is less successful in developing individual skills. Most of our graduates, upon completion of the MDPI program, have recommended that we provide follow-up programming to provide further development in areas which are more specific to their job performances. We have responded by providing an advanced program of elective seminars in areas that have been suggested by our manager-participants and their supervisors. At this stage we feel that this effort has been only partially successful. It is our purpose in this section to describe briefly our experience in this advanced MDPII program and to discuss some of the questions and problems confronting us in this endeavor. Hopefully, these considerations will be helpful to interested parties in other institutions who are wrestling with similar problems.

Advanced Level Program:

After our basic level MDPI program had been underway for a year, we began to think about the feasibility of providing an advanced level program to provide coverage of areas and skills not included in the basic program.

- In 1976-77, we experimented with two seminars, one in the Fall on Communications and one in the Spring, an all day seminar at Endicott House, covering these areas: University governance (not included in the program at that time), the University development function, and a collective bargaining role play exercise. The response to these seminars was very positive and we were encouraged to expand the program.

- In 1977-78, we organized our MDPII as a program of "electives" to serve as a logical extension of our "core" MDPI program. We scheduled six advanced sessions (one per month) on Wednesday afternoons along the familiar pattern of our MDPI schedule. Although we did not have a formal course schedule or sequence, we did organize our electives within an overall framework of three main areas:

1. The University – Overall Management Perspectives
2. University Operations and Services
3. Management Style and Personal Skills Development

For a more detailed description of the MDPII program, please see Appendix D 1. The attendance at the seminars was good, averaging 20-25 people. Our attendees found the sessions to be interesting and useful.

- In subsequent years, we have continued the MDPII program along similar lines. We have offered a variety of seminars in areas of current interest and, when appropriate, we have repeated sessions which have stimulated increased demand. Within the individual University functional areas, vice presidents and directors have developed on-going programs to provide for the development of knowledge and skills which are more directly applicable to their functional areas.

- As an interesting off-shoot of our MDPI program, our Personnel Office has developed a modified version of the program for our secretarial and clerical personnel. This eight-session program utilizes many of the same session leaders who adapt their presentations and exercises to meet the different needs and interests of our secretarial/clerical staff. This program has provided an effective communications and morale dimension in this important area.

Program Review:

It has been our practice to meet periodically to evaluate our experience and to consider the future direction of our management development effort. These discussions have provided the basis for an evolving concept which, in our current stage of thinking, perceives of our overall management development programs as consisting of four main components:

Component I. Organization Perspective

This is the important foundation area for all managers as presented primarily in MDPI. It focuses on the University; its goals, objectives, plans, operations, and relationships. In addition, it considers the management function and its application in the University environments.

Component II. On-Going Communication

This is an extension of Component I. It is designed as a forum for vice presidents and directors in a seminar format to report on current happenings, future directions, and other topics of general interest. The objective of these meetings (once per semester) is to provide a communication vehicle for our vice-presidents, deans, and directors.

Component III. Management Skills

The third component consists of programs and workshops to improve the management skills of our individual managers. These are skills that apply to all managers such as time management, communication, leadership skills (delegation, motivation, recruiting, hiring, performance appraisal, coaching, etc.), management by objectives, career planning, and others. The format for these seminars fits the topic.

The management skills component is the area in which we would like to direct increasing attention and emphasis in the foreseeable future. There are many areas to be covered and several options available to us in terms of seminar leadership and materials design. There are many packaged programs, films, seminar leaders, etc. available from outside the University.

Component IV. Individual Skills

In the area of skills development, there is an even more specific focus to be addressed in terms of specific tools or skills. In one sense, these skills may be thought of as the "how-to" skills in such areas as computers, finance, math for management, etc. These skills may not be the same for all managers and tend to be job related. Much of the training in these areas is best done within departments or individual work areas. The important responsibility of the management development program is to ensure that individual needs are being recognized and that appropriate on-the-job and/or supplementary training is being provided. In many cases, individuals are enrolled in courses and seminars away from the University to develop specific skills. This is an important adjunct to our program in that it allows us to match individual needs with specialized programs and courses.

The four component approach establishes a broad program design which provides for the continuation of the basic program (MDPI) on an as-needed basis but with continuing attention shifted toward the advanced level areas involving management skills development and personal job-related skills development. It is our current belief that this approach represents a clear program framework for Phase II of our management development effort.

Current Concerns:

In Phase I of our program, we were dealing with a limited number of participants and we were addressing areas which were of common interest. As a result, the program was rather efficient in terms of our investment in time and money. Our design, administration, and teaching efforts were undertaken by our regular staff as part of their ongoing responsibilities. Because the scope of the program was modest, the time demands on our people were not unreasonable. In the economic sphere, we spent less than $20,000 per year in Phase I of the program. (This includes our direct costs for teaching, administration, teaching materials, facilities, food, socials, gifts, etc. It does not cover many indirect costs). As we consider the commitment necessary for Phase II of the program, we are confronted with some significant concerns:

1. Beyond the initial level, our manager participants stated that they wanted the advanced level program to address areas that were more immediately applicable to performance on the job. While there was some evidence of continued interest in general areas evidenced by attendance of the MDPII seminars, the predominant request was for a program to address the individual needs of middle managers for development of specific skills which relate to job performance and management growth.

2. As our base of "graduates" reaches over 200 people, we are clearly challenged to develop realistic ways to identify individual needs and to translate these needs into a feasible program response. Some people need to know more about accounting or budgeting or planning. Others need help in such areas as supervision, time management, team building, performance appraisal. Still others are weak in areas of basic

math, statistics, business communication, etc. This list can go on and on. The situation is complicated by the fact that we are attempting to meet the developmental needs of managers at all levels of the organization, and in all of the different operating departments.

3. Current thinking in the field of management development emphasizes the importance of tailoring programs to meet identified needs and on-the-job requirements. We see this reflected in current journal articles and research results pertaining to effectiveness of management development programs in the industrial sector.

4. Our own current research points out the importance of management development as it relates to manager turnover. We see the retention of key people as an important objective of our management development effort. This, in turn, suggests that middle management manpower planning is an important adjunct to our Management Development Program. If we think of our Phase I program as a program that focuses on the question, "Where am I?", then, perhaps the advanced Phase II program should consider the question, "Where am I going?" It is difficult to think about Management Development in the broad sense without considering the important aspect of career growth as well as skill development. Therefore, we are beginning to think that our advanced Management Development should include aspects of career counseling (related to performance evaluation), management manpower planning (including job rotation), as well as individually tailored management skills programming (including internal and external options).

5. When we get to this stage in the design and development of our Management Development Program, we are confronted with some important questions concerning the commitment required to administer such a program:

   - Can we continue to run an expanded program effectively as a part-time responsibility?

   - How can we provide the necessary organization for linking individual needs assessment, performance evaluation, career planning, management manpower planning and management skills development?

   - What is necessary in terms of management direction and financial commitment to carry out such a program?

   - In terms of the several major problem areas confronting our executive management in the period ahead, is this an area which deserves an increased share of management attention and financial expenditure?

These are some of the questions which we are weighing as we consider our future direction and commitments in the area of management development.

A New Breed of Managers:

The decades of the '80's and '90's promise increasing demands and more complex problems for managers at all levels and in all areas in our institutions of higher education. We must develop a new breed of professional managers for our educational institutions; managers who are competent planners, who are knowledgeable about the complex relationships and functions of our not-for-profit institutions, who are sensitive to economic and human dimensions, and who are committed to long term careers in this field.

- We must attract high-caliber people.
- We must develop them as sophisticated managers.
- We must retain them by offering promising career opportunities.

If our forecasts concerning the challenging period ahead are in fact real, so too then are our needs for better managers. The responsibility for developing these is ours alone.

With this in mind, we have attempted in this document to provide a description of one approach in the design and development of a basic management development program. We hope that this description will be of some assistance to persons in sister institutions who may be involved in like endeavors.

Appendix A

Examples of Program Announcements, Letters, Schedules, and Certificate of Completion

Spring 1981

MANAGEMENT DEVELOPMENT PROGRAM

Unit	Date	Session	Unit Leader
		1. University Management	
No. 1A	Thursday, January 22	A. University Objectives	
		1. The Jesuit Tradition and Education	J. Donald Monan, S.J.
1B	Friday, January 23	2. The Board of Trustees	Margaret A. Dwyer
No. 2A	Friday, January 23	B. Organization, Functions, Relationships	
		1. An Overview	Frank B. Campanella
2B	Friday, January 23	2. Executive In-Basket	Raymond F. Keyes
No. 3	Wednesday, January 28	C. University Governance	Joseph A. Panuska, S.J.
No. 4	Wednesday, February 4	D. University Planning	
		1. The Planning Process	Raymond F. Keyes
		2. An Overview	Frank B. Campanella
		II. University Operations	
No. 5	Wednesday, February 11	A. Boston College - Past and Present	
		1. Historical Perspective	Charles F. Donovan, S.J.
		2. Current Issues	Panel of Deans and Faculty
No. 6	Wednesday, February 18	B. Financial and Business Operations	
		1. Organization	John R. Smith
		2. Budgeting	James P. Kennedy
		3. Long-term Financing	John R. Smith

Appendix A1

Unit	Date	Session	Unit Leader
No. 7	Wednesday, February 25	C. Enrollment Management	John J. Maguire
No. 8	Wednesday, March 4 (ALL DAY)	D. Management Information Systems	
		1. Introduction	C. Peter Olivieri
		2. Application	Bernard W. Gleason
		3. Computing Center	James Kidd
		III. Human Resources	
No. 9	Wednesday, March 11	A. Behavior in Organizations	Judith Gordon John Lewis
No. 10	Wednesday, March 18	B. Management in Student Life Areas	Kevin P. Duffy
No. 11	Wednesday, March 25	C. University Personnel Relations	Leo V. Sullivan
No. 12	Wednesday, April 1	II. E. University Relations	James P. McIntyre
		1. Alumni Association	John Wissler
		2. Office of Communications	Paul Hennessy
		3. University Development	Karl Salathe
No. 13	Wednesday, April 8 (ALL DAY)	IV. Planning and Conducting Effective Meetings	Raymond F. Keyes
		V. Program Summary and Conclusions	Frank B. Campanella

Appendix A1

Appendix A2

BOSTON COLLEGE
CHESTNUT HILL, MASSACHUSETTS 02167

EXECUTIVE VICE PRESIDENT

January 10, 1976

TO: Elizabeth Granger

FROM: Frank B. Campanella

SUBJECT: Management Development Program

CC: Rev. Charles F. Donovan, S.J.

Dear Betty,

You have been nominated by Father Donovan to attend the first session of the Management Development Program. As you know, this is a new program offered under the auspices of the Office of Personnel Relations. I have enclosed a brochure which outlines the objectives and format of the program in general terms. Within the month you will receive more detailed information including a course outline, names of faculty who will be responsible for the various sessions, a bibliography and some initial readings.

Over the summer a great deal of effort was expended to put together a fairly rigorous and sound management curriculum. In addition, the format and presentations have been designed to insure that we have a truly first-class program.

If you would like to participate in the program we would ask for two commitments. First, an absolute commitment to attend every session. Most of the course material is scheduled sequentially and each presentation presumes some expertise in material already covered. Given the amount of material we hope to cover, the program just will not work if there are people in and out in accordance with various individual schedules. (The schedule for the first class is enclosed.) The second is a commitment to do the reading and the work required, prior to each session. This is for obvious reasons.

One element that influenced your nomination is your ability to contribute to others in the program and be openly critical (in the good sense of that word). We would like to rely on your honest and critical appraisal of each class, its presentation, the materials used, etc. in order to revise and improve the program for the classes that will follow next year.

We are pretty enthusiastic about this program and hope you will be able to join us. If you have any questions, I would suggest that you call Leo Sullivan (Ext. 2117) or Ray Keyes (Ext. 2297).

Sincerely,

Frank B. Campanella

FBC:jk
Enclosures

BOSTON COLLEGE

MANAGEMENT DEVELOPMENT PROGRAM

Background Information

In a few weeks, you will be joining the Management Development Program for Boston College Administrators and Professional Staff. We are sending this information to you in advance of the initial meeting to provide an additional perspective on the program itself and to provide relevant background information for the initial sessions. We think that this background information will help to make the sessions as interesting and as interactive as possible. As mentioned in previous correspondence, you can expect to receive "advance reading assignments" before most of the remaining sessions as well.

Program Objectives

In our brochure, we presented the objectives and the goals of our Management Development Program. We would like to repeat them here. The overall objective of the program is to further strengthen the University by improving current and future management performance through a program of formal management education. Specific goals of the program are:

1. To encourage our administrators and managers to understand and identify with our Jesuit tradition, educational ideals and institutional objectives.
2. To broaden their views of the University organization and functions and to stress the importance of the interdependence of these functions.
3. To examine the key elements of the management process and their application to the management of educational institutions.
4. To study financial management in higher education in order to better understand sources and uses of funds, financial

practices, control procedures, management information systems and financial planning.

5. To explore the questions and problems relating to human behavior in the academic environment including organizational theory, interpersonal relationships and personnel management.

6. To encourage the development of skills which are useful to managers in the performance of their responsibilities.

Program Framework

In putting together the elements of a program to accomplish these objectives, we have worked within the traditional framework generally referred to as the Management Concept. Therefore, although each session is planned to provide a valuable purpose by itself, we hope that you will see the relationship of the parts to the broader concept of a Management Process.

What is the Management Process?

Simply stated, the major role of management centers around the accomplishment of the predetermined objectives of the organization or institution. The Management Process, therefore, is concerned with the important functions or activities involved in accomplishing these objectives. For many years, people have been defining and discussing the various activities involved in the management process. Because management involves so many simultaneous and often overlapping actions, it has been difficult to develop a total perspective without adopting some method of breaking the whole activity into separate parts or major functions.

These essential management functions can be identified as:

(1) Planning
(2) Organizing

(3) Directing
(4) Controlling

It is significant to note that various authorities describe the Management Process in different terms. It is evident, however, that there is substantial agreement on the process itself although there is less agreement on the terminology and the separate sub-divisions. As a result, we may see the Management Process variously described in one of the following ways:

Planning - Organizing - Integrating - Measuring
Planning - Organizing - Motivation - Control
Plan - Organize - Guide Performance - Appraise Result
Planning - Organizing - Controlling
Planning - Organizing - Actuating - Controlling
Planning - Organizing - Assembling Resources - Directing - Controlling
Planning - Executing - Controlling
Organizing - Planning - Leading - Measuring & Controlling

In reviewing these different views, it appears that planning, organizing, and controlling have general acceptance. Most differences of opinion are in the area of getting people to carry out the plan. Motivating, directing, actuating, integrating, guiding, leading, and executing are terms which do reflect different approaches. Nevertheless, they all reflect a recognition of a key management function in this area of getting action on planned objectives.

Planning

The managerial function of planning involves the development of tactical or annual plans as well as the strategic or long-range plans which establish the overall direction for the organization. A sound plan includes (1) a factual information base, (2) a set of objectives to be accomplished, and (3) concrete action programs for accomplishing the objectives that have been set. The process of planning can be best understood if we consider the various stages in the planning cycle:

1. To start the cycle, complete plans are developed - i.e. objectives are set, alternative courses of action are evaluated, and supporting programs are laid out.
2. In the execution stage, the action steps in the programs are carried out.
3. In the measurement stage, actual results are measured against planned objectives and the reasons for significant differences are identified.
4. In the replanning stage, some objectives may have to be revised if they have proved to be unrealistic in light of current conditions. But the greatest emphasis should be placed on strengthening old programs and implementing new or alternative programs as needed to achieve agreed-on objectives.

Organization

This consists of determining the best methods of assigning facilities and people to accomplish the established objectives. Thus the planned work-to-be-done forms the primary basis for organizing. The work-to-be-performed is grouped into organizational units and jobs and people are assigned to them. In formal organization, we are concerned with the division of work and personal relationships that are deliberately set up to achieve organizational goals.

Direction

Clear plans and sound organization provide the foundation but management must also provide direction and leadership if the people in the organization are to work effectively to accomplish the planned objectives of the organization. The direction function includes motivation, human relations, instruction and development, and proper communication.

Controlling

The control function involves establishing yardsticks for measuring progress in reaching goals, identifying variations from plan, and taking corrective action. As outlined in step #3 of the planning cycle, the control function is the measurement stage in which actual results are measured against planned objectives. In order to apply the control function, there must be measurable factors in performance, such as quantity, quality, cost, or time allocation. These measurable factors can then be used to compare actual performance with planned performance. A well-designed management information system can provide timely, relevant control reports to management to assist them in identifying deviations from planned performance and in taking necessary corrective action.

Management Process and Management Development

As we proceed with the Management Development Program, we will be dealing both directly and indirectly with the Management Process functions. Fr. Monan's opening session will address the subject of University goals and, as such, provide us with the top management statement of our overall strategic direction. Subsequent sessions will deal with planning, organization, leadership, motivation, financial and budgetary systems, management information systems, etc. We repeat that the Management Process is a useful framework for integrating the various areas and topics covered in the Program. In a continuing sense, Management Process is a valuable framework to bear in mind as we attempt to improve our understanding of our current and future management responsibilities.

Back to Basics

In selecting candidates for the Management Development Program, we have attempted to assemble a diverse group of participants. In some of our sessions, we will be starting at a basic level followed by more advanced material. For some participants, the basic material may be in the nature of a review. In such cases, we ask for your forebearance and look forward to your active participation and assistance.

Appendix A3

ENDICOTT HOUSE

Endicott House, a commanding French-style chateau surrounded by 20 acres of beautiful gardens and woods, was given to the Massachusetts Institute of Technology early in 1955 by provision of the late H. Wendell Endicott, Boston business executive and distinguished public servant. Although only 12 miles from the M.I.T. campus, its secluded and luxurious surroundings make it an ideal conference center. Large and commodious meeting rooms, dining rooms, and overnight accommodations make possible great flexibility in program planning for up to 80 participants.

Endicott House provides a spacious and quiet setting for many activities in M.I.T.'s regular program - conferences, seminars, professional meetings, study groups, and special research programs. In addition, it may be made available for educational meetings and conferences in the public interest conducted by organizations other than M.I.T. Outside organizations which have used Endicott House include other universities, professional societies, and government agencies such as the National Science Board - National Science Foundation, the Space Science Board of the National Academy of Sciences, International Marketing Institute, Association of American Medical Colleges, and the American Academy of Arts and Sciences.

Endicott House is eminently suited for resident conferences ranging from 20 to 80 participants. Overnight accommodations are available for only 31 guests, but overflow can be housed in a nearby motel. Conference room and dining room facilities are available for 80 participants. The grounds display trees, flowers, and shrubs, many of them collected from different parts of the world by Mr. Endicott. Wooded paths wind through the gardens and down to a beautiful pond. There is an outdoor swimming pool and a tennis court.

Conferences at Endicott House are diverse in character, subject matter, and duration, but all share the advantage of freedom from the distractions of nromal business and social life. The house offers isolation in comfortable surroundings conducive to the learning experience. Whether conferences are in residence for two days or for as long as three months, participants benefit from the unique opportunity to live and work together.

Boston College
Management Development Program

Presents this Certificate of Completion to

having participated in the program entitled

Management Development 1

Frank B. Campanella
Executive Vice President

Leo V. Sullivan
Director of Personnel

Raymond F. Keyes
Program Coordinator

Date

Appendix A4

Appendix A5

BOSTON COLLEGE
CHESTNUT HILL, MASSACHUSETTS 02167

EXECUTIVE VICE PRESIDENT

April 5, 1979

TO: All Graduates and Faculty
Management Development Program

FROM: Frank B. Campanella

Dear Colleague,

I would like to invite you to join with the most recent graduates of the Management Development Program for a celebration in their honor.

We will gather on the occasion of the final session of the Spring 1979 class for a reunion of all preceding classes. The reception will begin at three o'clock at Putnam House on the Newton Campus. I look forward to seeing you there.

Sincerely,

Frank B. Campanella

FBC:jk

Appendix A6

BOSTON COLLEGE
CHESTNUT HILL, MASSACHUSETTS 02167

EXECUTIVE VICE PRESIDENT

April 28, 1980

TO: Management Development Program Faculty

FROM: Frank B. Campanella

Dear Colleague,

As the academic year comes to a close, I would like to convey my appreciation to each of you who have contributed to the success of the Management Development Program. After five years and nine classes, about 200 participants have completed the basic fourteen session program. Your own voluntary contributions of time and personal expertise have been essential for maintaining the vitality of the MDP program. Your effort is greatly appreciated by the University and highly applauded by the program participants.

Please accept this gift as a token of the University's appreciation for your help. To this I add my own "thanks" and best wishes for a pleasant and relaxing summer.

Sincerely,

Frank

Frank B. Campanella

FBC:jk

Appendix B

Examples of Teaching Materials Designed for the Program

Appendix B1

Bolton College Institutional Description

Prepared By:
Frank B. Companella
Executive Vice President
Boston College

THE UNIVERSITY OF BOLTON COLLEGE

Institutional Description

The University of Bolton College was founded in 1863. From a small, liberal arts college serving the Bolton community, Bolton College has evolved into a large, multi-dimensional university. The University is now the third largest Catholic university in the United States, and it is comprised of thirteen schools, colleges and institutes offering fifteen degree programs.

Located on the border of the city of Bolton, the University derives benefits both from its proximity to a large metropolitan city, and from its setting in a residential suburb. The University is comprised of two separate campuses. The Walnut Valley Campus, spread over more than 200 acres, is tri-level. Dormitories are on the upper campus; classroom, laboratory, administrative and student service facilities are on the middle campus; and the lower campus includes apartment residences as well as athletic, recreational and parking facilities. The Lextown Campus is a 40 acre tract located less than a mile from the Walnut Valley Campus. It is the location of the Law School and also contains classrooms, laboratories, dormitories, athletic areas and student service facilities.

The evolution of Bolton College was particularly evident during the 1920's. The Summer Session, the Graduate School of Arts and Sciences, the Law School, and the Evening College of Arts, Sciences and Business Administration were added to the original College of Arts and Sciences. The Graduate School of Social Work was established in 1936, and the College of Business Administration in 1938. The latter, with its Graduate School (1957) is now known as the School of Management. The Schools of Nursing and Education were founded, respectively, in 1947 and 1952.

The library holdings exceed 900,000 volumes, which are contained within one central and seven satellite libraries.

The faculty numbers nearly 800, of which 521 are full-time faculty, 140 are part-time faculty, and 100 are teaching fellows. The University also employs over 1,000 non-faculty staff personnel for administrative and secretarial purposes and for maintenance of grounds and buildings.

In recent years the University has experienced a period of growth. Total student enrollment has grown from approximately 10,900 in 1970 to 12,500 in 1975. Within the total undergraduate enrollment, the number of resident students has increased from 2,589/6,663 in 1970 to 4,800/8,200 in 1975. The admission of women to all colleges within the University has produced an increase in the number of women from 3,660 in 1970 to approximately 6,200 in 1975. Thus, the overall picture of the University today is one where the total enrollment exceeds 12,000 students, of which about 8,200 are enrolled in the four undergraduate colleges. The undergraduate student body is about equally divided between men and women. About 60 percent of the undergraduates are resident students, while 40 percent are commuters.

Bolton recently completed a five year academic plan and is currently engaged in making annual modifications to a rolling five year financial plan. Work is also underway to develop a master plan for physical plant.

Selected portions of these plans along with various organizational, financial and enrollment data are appended.

Appendix B1

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(1) The University of Bolton College has long admired its sister institution across the river, Boston College. Rather than "reinvent the wheel" Bolton officials decided to adopt Boston College's recently published Statement of Goals, which are included verbatim in Appendix E along with a forward written by the President of Boston College.

Bolton College Executive In-Basket

Prepared by:
Raymond F. Keyes
Associate Professor
School of Management
Boston College

Appendix B2

Management Development Program

Executive In-Basket

SETTING

You are Dr. Paul Bell, Executive Vice President of the University of Bolton College. You have been in this position for two and one-half years.

It is Friday evening, November 14, at 8:00 P.M.; you have just spent the afternoon at a quarterly Board of Trustees meeting which was followed by dinner. The meeting was successful and the dinner pleasant. You have returned to your office to check the afternoon mail and phone calls.

On Monday you are scheduled to deliver a paper in Chicago entitled "Academic Planning and University Financial Planning". Tomorrow, Saturday, is the day you have set aside to pull together ideas and materials for this presentation. The conference ends on Wednesday and you expect to return to the office on Thursday morning.

INSTRUCTIONS

You are to go through the collection of mail and messages which are attached. Write down on a separate sheet for each exactly the action you would take. For those you will handle on your return, state exactly what you will do then. Use the number in the upper right hand corner of each piece for identification purposes.

You are Dr. Paul Bell, Executive Vice President.

You will not return until next Thursday morning.

Write briefly but specifically the action you would take on each item.

Appendix B2

UNIVERSITY OF BOLTON COLLEGE

University Personnel referenced in the In-Basket correspondence:

Rev. James J. Clifford, S.J.	President
Dr. Paul Bell	Executive Vice President
Rev. Charles F. Glendon, S.J.	Vice President and Dean of Faculties
Thomas F. Regan	Trustee
John R. Finn	Vice President of Finance and Business Affairs
Peter J. McDonough	Vice President for Student Affairs
John Carrington	Vice President of University Relations
Rev. William O'Shea, S.J.	University Chaplain
John Patrick	Dean, School of Management
Kevin Mahoney	Director, MIS Group
Attorney Frito	University Lawyer
Robert Richards	Director, Office of Research Administration
James Breed	Faculty Member
Elizabeth Nally	Faculty Member
Pat Roberts	Paul Bell's Executive Secretary
Tom Phelps	University Librarian
Joseph Ryan, S.J.	Director, Computer Center
Susan Carey	Asst. Librarian for Technical Services
Ed Moore	Director of Public Relations

Appendix B2

University of Bolton College

Walnut Valley Campus

November 12, 1976

TO: Dr. Paul Bell
Executive Vice President

FROM: Ms. Elizabeth Nally
Associate Professor
Mathematics Department

Dear Dr. Bell,

I am writing to request that you make available to me salary information for those faculty members in the Mathematics Department who are in the rank of Associate Professor. As you know, the recent studies have shown that there is a continuing disparity between the salary levels of male versus female faculty members of comparable rank. These findings come as no great surprise to me since my own salary increment last year was considerably below my expectation, and certainly did not reflect any effort to narrow the gap here at Bolton College.

I hope that you will agree to provide this information so that I will not have to submit a formal appeal through the Massachusetts Commission against Discrimination.

Elizabeth Nally

Elizabeth Nally

CC: Ms. Mary Yurasian
Director of Affirmative Action

Appendix B2 2A.

University of Bolton College
Walnut Valley Campus

Office of Management
Information Systems

November 13, 1976

Dr. Paul Bell
Executive Vice President

Dear Paul,

The attached memo speaks for itself. John Carrington is really putting the pressure on for systems support.

As you know, we have established priorities for our systems development work for the next eighteen months. John's request may be valid but it was not identified as a top priority item in our last review session with you.

At this point, however, I'm not sure how to respond to John's "formal request". In order to develop the system he needs, it would require an additional two man-years of systems development work. Needless to say, I am very aware of our current budget constraints, but I can see no way to do this within our existing manpower and budget allocations. On the other hand, we could bump one of the on-going projects, but I would not take it upon myself to make such a decision. I would anticipate some lively repercussions.

Finally, we could turn down John's request. I don't think that he will be satisfied with such a decision, however, if it comes from me. He has already told me that he intends to bring this to your attention if he does not get any satisfaction at this level.

I would appreciate it if you would let me know how you want me to proceed with this.

Cordially,

Kevin Mahoney
Director, MIS

KM:lkh

Appendix B2

University of Bolton College
Walnut Valley Campus

November 11, 1976

TO: Kevin Mahoney
Director, Management Information Systems

FROM: John Carrington
Vice President of University Relations

SUBJECT: MIS Support for Development Programs

CC: Rev. J. Clifford, S.J., President

Kevin,

At our meeting on Wednesday, we discussed the two critical factors involved in the redesign of our computer-based information system to support the fund raising activities of our Development Office.

First, we have the "system design" question. As I understand it, you feel that your systems analysts can work with Jim Wheaton's people in the Development Office to determine their information requirements and to update the system to meet our current needs. You point out, however, that the main problem is in the availability of personnel-analysts, key-punchers, etc., and budget necessary to bring such an extensive revision on line.

This brings us to the second critical factor, namely that of "priorities". I can appreciate your concern for the establishment of priorities and I realize that you are over-extended in other key areas of the University. However, I do feel that the existing situation in the development area suggests a review and reordering of our current priorities. We are committed to a major capital gifts program which is of critical importance to the future of the entire University. It is vital that we have accurate and timely information available on alumni, charitable foundations, corporations, and other potential donors. The success of our capital gifts program may well depend on the effectiveness of our information systems. I can think of few things that are of greater importance tothe University at this time.

I hope you will understand why I cannot be satisfied with any response which postpones action on our requirements. We need support and we need it now. Please consider this a formal request for immediate action. You may have to reorder priorities or seek additional budget, but we must get something started. I will appreciate it if you would get back to me on this request as soon as possible.

University of Bolton College
Walnut Valley Campus

Dean of Faculties

November 11, 1976

Dr. Paul Bell
Executive Vice President

Dear Paul,

At the request of the Director of Affirmative Action, I will be writing shortly to deans and to chairmen with regard to procedures connected with faculty recruitment. Last year the faculty recruitment cycle started late and hence Affirmative Action ads were late, because a decision had to be made with regard to possible new slots and then a further decision regarding the allocation of the ten slots awarded.

If there are to be no new slots, then the only recruiting will be for replacements. We have a certain number of strictly one year people and we have others who have already been given terminal notice. Hence, I presume we will have the usual 35 to 45 openings on a replacement basis. If we are engaging only in replacement recruiting, I see no reason why most of the ads and initial activities could not start in December.

Since we are not planning any increase in undergraduate enrollment am I right in assuming that we are not planning to add any new faculty slots? If so, I think it might be well if I let deans and chairmen know this at once so that people can start planning.

I expect that Dean Patrick may be pressing for more faculty, particularly if he is encouraged to take more students. But I don't think that if his school grows, the total undergraduate enrollment will grow. Hence, I am assuming that the only way we can get added faculty for Patrick will be to take a position or two from another area. This obviously will not be done without anguish and outcry.

I should be communicating with the deans and chairmen on this matter some time before the Deans Council meeting next Wednesday, the 19th.

Sincerely yours,

Rev. Charles F. Glendon, S.J.
Dean of Faculties

CFG:nkt
cc: Rev. James Clifford, S.J.

Appendix B2 4.

University of Bolton College
Walnut Valley Campus

November 13, 1976

TO: Paul Bell
Executive Vice President

FROM: Robert Richards
Office of Research Administration

Dear Paul,

As you know, Tom Smalley was quietly discharged from the University last summer. Tom was in a position where he handled University funds, and we were concerned about the unexplained "shortages" that came to light when the auditors reviewed our contract disbursements. While I am quite sure that we could have proven that there was "mismanagement of funds", we decided against legal action on the advice of University attorneys.

Yesterday, we received a reference check from the Grants and Contracts Office at Urbana University. Tom is applying for a position with them and they have asked us, among other things, to comment on his honesty and integrity. This is a sticky situation since we did not really prove that Tom was guilty of any wrongdoing here at Bolton. On the other hand, we had little doubt in our own minds although we did not have hard evidence to support any legal action. For his part, Tom seemed quite relieved to be discharged without a formal complaint. He has a wife and six children, and I'm sure that he did not want any distasteful publicity.

Now I have a problem. How do we respond to the Urbana University inquiry? Do we inform them that we discharged Tom because we were concerned about his honesty -- even though we did not prove anything? Or should we say nothing about the situation? What are our legal and moral responsibilities to the parties involved? Do you have any advice concerning the appropriate way to handle this problem? If so, please let me know your views by next Monday, since I should respond to Urbana University as soon as possible.

Thanks for your assistance on this!

Cordially,

Bob

Robert Richards

RR:bd

CAPITOL UNIVERSITY
Washington D.C.

Office of the Director
of the Budget

November 5, 1976

Dr. Paul Bell
Executive Vice President
University of Bolton College
Walnut Valley, Massachusetts

Dear Dr. Bell,

I had the pleasure of attending your seminar at the thirteenth biennial workshop of E.A.C.U.B.O. Your presentation concerning the use of RRPM as an effective academic planning tool was very informative, especially with regard to the apparent generation of a cohesive planning unit composed of both academics and administrators. Academic Planning in the past seems to have been done in isolation with little if any participation of financial administrators. Your bridging of this gap is certainly quite an accomplishment.

We at Capitol are in the process of initiating some type of formal academic planning with certain financial constraints and would be very interested in receiving a copy of your presentation and any other insights that you might be able to give us from your experiences regarding the problems that lay ahead.

Your accomplishments in the field of academic planning are indeed encouraging, and I look forward to hearing from you soon.

Sincerely,

Trevor Ricards
Assistant Director for Budget and Planning

TR:cm

University of Bolton College
Walnut Valley Campus

Vice President for Student Affairs

November 13, 1976

TO: Paul Bell

FROM: Peter J. McDonough
Vice President for Student Affairs

Dear Paul,

I have just come from a meeting with the executive committee of the UGBC. For the most part, our discussions centered on various programs and activities which were incorporated into their campaign promises to upgrade the quality of student support services throughout the University. They have some excellent ideas about and a genuine commitment to improve student life on campus.

In one area, however, we may be confronted with a problem. Again this year, the student officers are developing an active campaign against any increase in student tuition. Their plans call for aggressive communication and demonstration, including confrontation meetings with Father Glendon, yourself, John Finn, the Budget Committee, and, last but not least, the Trustees. You can expect to receive an invitation to an initial "Tuition Confrontation Meeting" tentatively scheduled for Tuesday afternoon, November 25th. You can be sure that this initial meeting will receive maximum press coverage in the Campus Reporter (and possibly in the public press and T.V., if they can whip up enough controversy).

I am alerting you now so that you will have an opportunity to think about how you want to respond. I think it is safe to say that you are being "set up" for a meeting designed to attract maximum attention to the tuition issue. Your participation will generate student interest and the "confrontation" format is designed to put you in a defensive position. Since the Budget Committee is still working on the tuition question, I'm not sure that you will be able to say much that is definitive on the subject.

The thing that bothers me the most, I think, is the suspicion that the whole tuition campaign is designed to promote the visibility and political ambitions of one or two student leaders. While we can't be rigid in our response to sincere student inquiry in this area, neither should we allow ourselves to be used to promote the political interests of a few students, particularly in an area which has such widespread ramifications.

Appendix B2

If you want me to, I will try to convince the UGBC leaders that the confrontation approach is unprofessional and unfair. I may be able to persuade them to adopt another approach or, at least, to postpone their campaign until we have some tangible results from the Budget Committee process.

Let me know how you want me to proceed on this.

Sincerely,

Peter McDonough

Peter J. McDonough

PJM:bd

DANA, RYAN AND SHIPSTEAD

Attorneys at Law

707-777-0177

One Sagamore Place
Prestige, Illinois

Dr. Paul Bell
Executive Vice President
University of Bolton College
Walnut Valley, Massachusetts

Dear Paul,

Congratulations on your presentation at the last meeting of the Board of Trustees. Your analysis of the University's long range goals and financial requirements was very useful to us, as trustees, in our evaluation of University priorities and resource allocations.

I meant to catch you after the meeting to ask a favor of you, and since I won't be able to make the meeting on the 14th, I thought I would write. My niece, Mary Ellen, is a senior at St. Roberts High School in Westbury. She is a very fine girl and I have encouraged her to apply to Bolton College. She is a solid B student, a school leader, and a socially mature young woman. Her father reports that she was disappointed in her college board scores, but she is taking them over again this Fall. She is applying to the School of Nursing as a resident student.

I would appreciate it if you would check with the admissions office concerning the status of her application. I realize that the number of applications is very high for the School of Nursing. However, Mary Ellen is an outstanding person and she would be a credit to Bolton College.

Cordially,

Tom

Thomas F. Ryan

TFR:blm

University of Bolton College
Walnut Valley Campus

University Chaplain

November 11, 1976

Dr. Paul Bell
Executive Vice President

Dear Paul,

What's the matter with that wonderful Management Information System we hear so much about? Last week I called Larry Mulligan in the Personnel Office to get an up-to-date list of married faculty members to use as a mailing list for our forthcoming lecture series on the "Crises in Modern Marriage". Larry tells me that we don't have our faculty members coded according to marital status. However, I'm sure that he does have the information somewhere in his faculty records. Larry claims that he doesn't have the manpower available to pull this information together.

I'm appealing to you because I think this is the kind of situation where we should expect to receive some real support from our integrated Management Information System. I feel that the Personnel Office should be advised to cooperate with this request and others like it. If the information requested is not already included in the system, such requests may point up important areas for inclusion.

Sincerely,

Bill O'Shea

William O'Shea, S.J.
University Chaplain

WO:k

115 South Street
Norwood, Michigan 60172

Modern Flag Poles, Inc.

November 11, 1976

Dr. Paul Bell
Executive Vice President
University of Bolton College
Lexton, Massachusetts 02167

Re: Mason Hall Classroom Building
University of Bolton College
Walnut Valley Campus

Dear Dr. Bell,

As an alumnus of the Class of '66, I would like to compliment the University on the outstanding program that was put together for the reunion classes in the Spring. There were events scheduled for every member of the family. Mary and I were very pleased that we had made the long trip back East to visit our Alma Mater. We have warm memories of our days at Bolton, and we look forward to the time when our youngsters (Jimmy 7 years and Maureen 5) will be returning to the Campus as students.

When we were on campus, I noticed that you were refurbishing the Mason Hall classroom building. It occurred to me that Mason Hall would provide the ideal setting for one of our deluxe electronic flag poles. This product is a high quality, low maintenance, efficient system. It would be an attractive and a functional addition to the campus. I am enclosing one of our descriptive brochures. I would personally favor Model FP 107A (with spotlights) but you might prefer another model. The prices shown are our normal dealer prices, but I am happy to say that I can offer the additional 25% discount (representing a saving of between \$1500 - \$2000) as my contribution to the Bolton refurbishing program.

Again, my sincere congratulations to Bolton College for its continuing adherence to the highest standards of education and campus living. I look forward to your early response.

Cordially,

James W. Boyle

James W. Boyle
Class of '66

JWB:ar
Enclosure

Appendix B2

University of Bolton College

Walnut Valley Campus

Office of the Dean
School of Management

November 12, 1976

TO: Dr. Paul Bell

FROM: John Patrick

Dear Paul,

I have just met with the S.O.M. Department Chairmen and, as you know, they are very concerned about the availability of adequate student study space here in Furbish Hall. This problem has been festering for some time and I feel that we will have to respond soon or face the consequences in terms of student agitation and increased faculty pressure.

I am convinced that we can renovate some space on the second floor of the building, currently utilized as classrooms (F210 and F212) and the adjoining fraternity meeting areas (F214 and F215). My rough estimates suggest that we could convert the space into a study area for approximately 100 to 120 students. We would need some renovations to remove walls, lower ceilings, improve lighting, etc. In addition, we would need appropriate furniture (carrells or tables). I estimate that it would cost us in the neighborhood of $25,000 to $30,000 to make the necessary changes.

Again, I emphasize the urgency of this matter. I would like your reactions as soon as possible so that I may report back to our deans and student leaders.

/k

INTER-OFFICE MEMO

Nov. 14
3:15 pm

Dr. Bell:

Ed Moore from Public Relations called about a rumor that is flying around town which says that Bolton College is negotiating with St. James Seminary for the purchase of dormitory buildings situated on the seminary property in East Bolton. Apparently, there are several versions of the rumor, including one interesting one which suggests that the dormitories will be used as freshmen, coed dorms. The idea is that the sobering influence of the seminarians will provide a healthy atmosphere for exuberant young men and women who are living away from home for the first time. Needless to say, this version leads to some interesting speculation.

Ed received a call from a reporter on the Bolton Gazette. They are running a story in this evening's edition which comments on the rumors. The Gazette anticipates a strong community reaction and they want a follow-up story for tomorrow's paper which includes a statement from Bolton College confirming or denying the rumor.

Ed also received a call from a Mr. Aaron Goldman who is the President of the East Bolton Neighborhood Association. Mr. Goldman was quite upset at the prospect of having several hundred of our college students living in dormitories previously occupied by "those nice, quiet, religious introverts". Mr. Goldman would also like to have some clarification of our intentions. Moreover, he wishes us to know that the Association is prepared to offer stiff resistance on the basis of traffic problems, inadequate parking, and "improper zoning for women". (How does one zone for women? - P.)

Ed would like to have you phone him this evening - to clarify our position and to discuss our response to the Gazette and to Mr. Goldman.

Pat

Appendix B2 12A.

University of Bolton College

Walnut Valley Campus

November 14, 1976

TO: Paul Bell

FROM: Kevin Mahoney

Paul --

Received your memo on the Library MIS and Pat's follow up phone call scheduling the meeting for Tuesday, November 25th at 2:00 PM. I know you are going to be away next week, and I wondered if there is anything you want me to prepare for the meeting?

Tom Phelps has already called me to register his strong support for the development of our own system. He will be coming to the meeting with all his arguments lined up.

Any consideration of MIS priorities must include John Carrington's request for the redesign of the MIS system for the Development function (see separate memo). John Carrington is demanding immediate action. In addition, some of our other major systems should be reviewed and updated as well.

University of Bolton College
Walnut Valley Campus

Executive Vice President

November 10, 1976

TO: John R. Finn, Vice President Finance and Business Affairs
Kevin Mahoney, Director MIS

FROM: Paul Bell

SUBJECT: Library MIS

CC: Tom Phelps, University Librarian
Joseph Ryan, S.J., Director Computer Center
Susan Carey, Asst. Librarian for Technical Services

Dear John and Kevin,

I think that we are about due for our annual meeting to review this year's progress and future priorities in the area involving the development of information systems. Pat will call you to schedule that meeting among the three of us.

As you recall at our meeting a year ago, we discussed the development of systems in the library area and decided to begin to explore needs, problems and alternatives during this year with the University Librarian and the library staff. In the interim, I understand that Kevin has attended a conference related to MIS development in libraries; discussed the availability of packaged software with IBM; met with Father Ryan to discuss hardward implications; and has met with Susan Carey, and perhaps others, on a regular basis to discuss technical needs.

My sense is that we are dealing here with a sleeping giant, which has gross implications not only for the systems development staff and the computing center, but also for library staff, equipment and facilities. While I take some solace in the fact that this appears to be the last major systems problem we must address, its magnitude and the related uncertainty in this field is somewhat less than comforting.

The basic options appear to be many.

1. Develop a system for ground-up.
2. Buy an existing software package (if available) and trade-up as others are developed.
3. Buy/lease a hardware-software system dedicated to library work.
4. Wait. Emulate the system and strategy adopted by a successful major institution.
5. Various combinations of the above in the short run and/or in the long run.
6. Other

At this point we should carefully weigh the factors related to long and short run costs and benefits, as well as the implications for the MIS Staff, the Library, and the Computing Center.

My suggestion is that we three meet with those on the CC list above, in order to begin a discussion related to needs, alternatives and required resources. After that we can meet to discuss the impact of various options for Library MIS on our overall priority scheme.

Barring any major objection to this proposed course of action, my secretary will call you and those on the CC list in order to arrange such a meeting.

Sincerely,

Paul

Dr. Paul Bell

PB:pr

Appendix B2

University of Bolton College

Walnut Valley Campus

School of Education

November 13, 1976

TO: Dr. Paul Bell

FROM: Dr. James Breed

Dear Paul,

I am really ticked off! I have a simple problem, but I can't seem to get anyone in this place to act on it, so I'm unloading it on you.

We have been out of mimeograph paper here in the School of Education for over three weeks. Our department secretary can't get any! The dean's office keeps assuring me that the paper is on order, but it doesn't get here. On Tuesday, I was told that it was on the truck to be delivered to us, but it isn't here yet.

This may not seem important to you, but is driving me up a wall. As a faculty member, I believe that I can expect minimal support from this university. It wouldn't seem that paper would be an unreasonable thing to provide in support of our teaching effort. We do like to use hand-outs, prepare exams, etc. Do you really want us to use bond paper for these daily needs?

I have already wasted several hours trying to resolve this stupid problem. My blood pressure is up and my morale is down. If we don't have any mimeo paper here on Monday, I am taking the liberty of ordering paper directly from the stationers -- and billing it to you!

Hope you don't mind!!!

Jim Breed

Jim Breed

Appendix B2

University of Bolton College

Walnut Valley Campus

Office of the President

November 14, 1976

Dr. Paul Bell
Executive Vice President

Dear Paul,

In our meeting last week we discussed the need for an increase in tuition for next year. While we can't determine the exact amount at this time, we do know that an increase will be necessary to meet our rising costs and we can anticipate a negative student response to any tuition increase. I am concerned that the annual tuition decision becomes a political issue for our campus politicians and an editorial issue for the Campus Reporter.

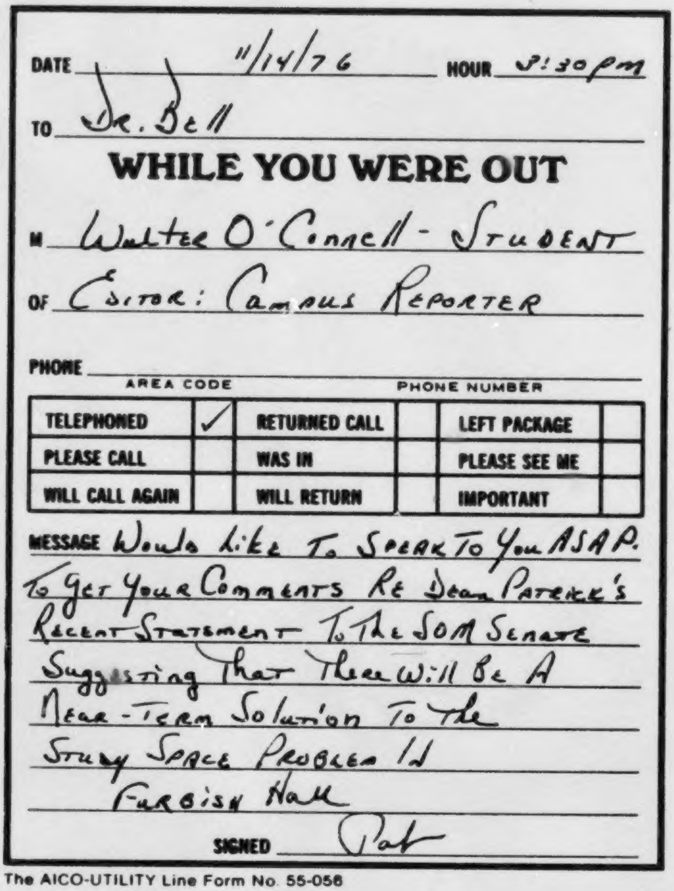
It seems that we are always placed in a defensive posture by being one of the first schools to announce our tuition policy each year. While this early announcement allows students maximum time to adjust their plans, it also earns us a disproportionate amount of negative attention. This becomes obvious in subsequent months as other schools announce steeper tuition increases.

We might consider delaying our tuition announcement but this would seem to me to run counter to the best interests of our student body and our prior agreements. Perhaps a better strategy would be to launch a concerted effort to communicate more effectively -- to anticipate rather than to respond, so to speak. Last year, we developed some significant information on operating expenses, inflationary pressures, comparative tuitions, relative rates of tuition increases versus cost-of-living increases, etc. This information was disseminated in response to student agitation and at a point in time when student leaders were already publicly committed. This year, I think that we should get this information on the "airwaves" as early as possible -- to reach as broad an audience as possible (parents as well as students). Therefore, I feel that we should respond to every reasonable opportunity to present the facts and insure that the University position is properly reflected in the dialogues that precede as well as follow the tuition announcement.

Sincerely,

Jim

James R. Clifford, SJ
President



DATE 11/14/76 HOUR 3:30 pm

TO Dr. Bell

WHILE YOU WERE OUT

M Walter O'Connell - Student

OF Editor: Campus Reporter

PHONE

AREA CODE PHONE NUMBER

TELEPHONED	✓	RETURNED CALL	☐	LEFT PACKAGE	☐
PLEASE CALL	☐	WAS IN	☐	PLEASE SEE ME	☐
WILL CALL AGAIN	☐	WILL RETURN	☐	IMPORTANT	☐

MESSAGE Would like To Speak To You ASAP.
To Get Your Comments Re Dean Patrick's
Recent Statement To The SOM Senate
Suggesting That There Will Be A
Near-Term Solution To The
Study Space Problem !!
Furbish Hall

SIGNED Pat

The AICO-UTILITY Line Form No. 55-056

University of Bolton College
Walnut Valley Campus

11/14/76

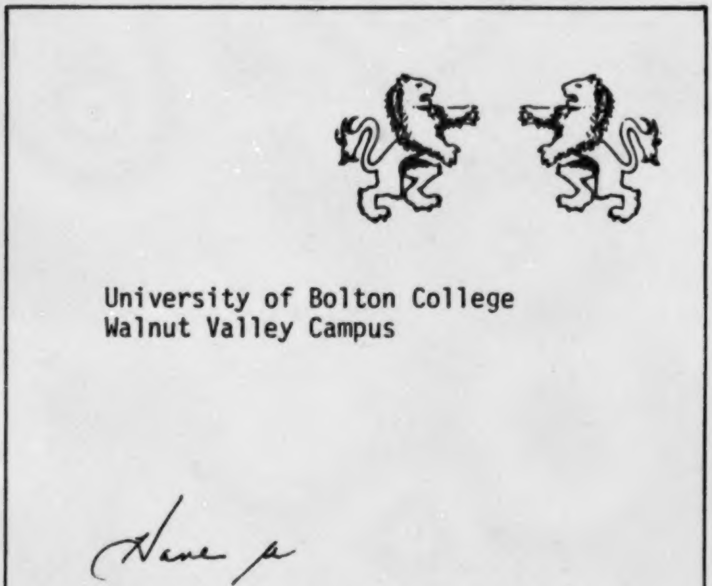
REMINDER

You were supposed to call the chairman of the Faculty Caucus prior to the Causus Monday night meeting.

Re: report in the student newspaper misquoted you as saying ".....4½% was budgeted for faculty increments.."

Chairman expects strong negative reaction from faculty since you are on records as indicating 6%.

Pat



University of Bolton College
Walnut Valley Campus

Have a
Good Weekend!
and a pleasant
trip to Chicago.

PR

Appendix B3

Planning Workshop

Prepared by:
Raymond F. Keyes
Associate Professor
School of Management
Boston College

BOSTON COLLEGE
MANAGEMENT DEVELOPMENT PROGRAM

Planning Workshop

Purpose: The purpose of the Planning Workshop is to see if we can apply some planning principles in a simulated setting. You will be broken down into small groups (five or six people) and we will present each group with a planning problem which is related to the planning situation in our University environment. We will ask each group to discuss the assigned area within the framework of the planning principles discussed earlier. We are attaching worksheets for you to use in organizing and recording your observations and recommendations. We will reconvene in approximately one hour to review and discuss the findings and recommendations of the various groups.

The Situation: As you know, the University has been engaged in formal long range planning activities for several years. The major focus of these long range planning efforts has been directed to our "most probable future". In the spirit of adaptive planning, however, we would like to begin to do some contingency planning on an experimental basis. Contingency planning involves preparation of plans to meet various eventualities - or alternative futures. In other words, what plan of action would we adopt if we consider a different set of future conditions - a more negative set of conditions (or a more positive one) than the "most probable future".

You have been invited to serve on a University planning sub-committee to consider alternative futures (scenarios). The task of the sub-committee today is to:

1. Review one or two specific scenarios.
2. Consider their implication in terms of University goals and programs.
3. Develop preliminary observations and recommendations as to how the University should respond in the event that these less likely alternatives do transpire.

Your thinking today may well position the University to react in a more expeditious and organized way in the face of changing conditions.

How to Proceed: You will be provided with two sets of alternative futures (scenarios) and a planning worksheet. These are not the futures that we must anticipate but they do represent possibilities. One scenario presents a future (1990) in which negative environmental conditions evolve while the second scenario describes an environment of unusual expansion and growth. Please begin with Scenario No. 1. Your group should discuss this alternative in the light of existing University goals (see University Goals Statement) and major programs. Should any of these goals be changed or eliminated? Should any new goals be added? What changes would you recommend in major University programs to respond to the conditions outlined in the Scenario. Please record your key observations and recommendations on the planning worksheet.

If you have time, please tackle Scenario No. 2 in the same way.

SCENARIO NO. 1

The following statements hypothesize some conditions and events which can be viewed as a possible alternate future for the year 1990:

- The decade of the '80's saw a leveling off of total population in the United States and a decrease in the size of the college-age population:
    - In 1976, there were about 8,000,000 college students. This was over half of the 18-22 age group.
    - In 1990, one study estimates a 15% reduction in college-age students and a decrease to 48% of 18-22 year olds going on to college or approximately 6,350,000 students in the 18-22 age group.
- In New England, there could be as many as 200,000 to 300,000 vacant places in colleges and universities.
- Increasing operating costs may result in increased tuitions in the range of $6,000 to $7,000 per year in private colleges and universities. Similar increases are anticipated in living expenses.
- The realities of economics (high operating costs and decreasing enrollments) are leading to program retrenchments in many institutions.
- More and more marginal institutions are being forced to close down.
- General economic conditions in the United States continue in a depressed condition - inflation, high unemployment, recession.
- The New York Times reports that the National Student Buying Boycott, entering its sixth month of activity, is beginning to gain serious momentum. Business leaders claim that they are unable to respond further to student demands for "increased employment opportunities for college graduates".
- The new government continuing education loan program (CELP) is encouraging more and more people to explore educational programs in continuing education, extension courses, and graduate programs.
- Economic pressures are forcing many schools to increase faculty teaching loads and to place increasing emphasis on teaching performance (quality and quantity) at the expense of scholarly research and publication.
- The Federal Appeals Court in Pennsylvania has upheld the lower court ruling (Collins vs University of Pennsylvania) that aptitude tests are discriminatory and unlawful for use in evaluating candidates for admission to colleges and universities receiving federal support.
- A recent nationwide survey of high school and college students (by the University of Wisconsin) indicates an increasing interest in educational programs which combine work with study.

SCENARIO NO. 2

The following statements hypothesize some conditions and events which can be viewed as a possible alternative future for the year 1990:

- The decade of the '80's saw continued moderate growth in the total population of the United States and a modest decrease in the size of the college-age population:
    - In 1976, there were about 8,000,000 college students. This was over half of the 18-22 age group.
    - In 1990, one study estimates a 6% reduction in college-age students but an increase to 60% of 18-22 year olds going on to college or approximately 8,750,000 students in the 18-22 age group.
- In New England, demand exceeds available places in colleges and universities.
- The rash of college and university closings of the early 80's has subsided with the weeding out of many of the small, private institutions. The survivors appear to be sound but overtaxed by the increased pressures placed upon them by increased demand. Most colleges and universities are reluctant to expand to meet current demands in view of the hard lessons learned in the 1970's.
- President Mondale is pressing hard to fulfill his campaign promise of '88 to provide increasing federal support to higher education:
    - Low-interest federal loans are becoming available to institutions to assist them in expansion programs.
    - Congress has passed the McNally/O'Neill Higher Education Loan Act to provide direct student loans on a long-range income tax pay-back plan.
- General economic conditions in the United States continue to advance at a near-boom pace -- high employment, strong business activity, moderate inflation.
- Time Magazine reports that the vigorous economic climate continues to generate attractive job opportunities for college graduates, particularly those for professional educators at either the undergraduate or graduate levels (law, engineering, medicine, management, nursing, education, technology, and science).
- Expanding demand and high retirement levels are creating an increasing shortage of qualified faculty personnel in most institutions.
- The Chronicle of Higher Education reports that one of the major problems in higher education today is the failure of colleges and universities to respond to the increasing demand for continuing education and enrichment programs.

Appendix B3

PLANNING WORKSHEET

Group No.______________

Scenario No. __________

Group Members:

____
____
____
____
____

1. Observations or conclusions concerning the alternative future:

2. Recommended changes deletions and/or additions to University Goals

3. Recommended changes in major University programs.

Appendix B4

Financial Aid Case

Dr. John J. Maguire
Dean of Admissions, Records
and Financial Aid
Boston College

Dr. James J. Scannell
Director of Admissions
Boston College

Financial Aid Strategy at Bolton College

The individual budget (tuition, fees, room and board, etc.) for students attending Bolton College is over $5,000. As a result of this high cost for private education, about 50% of those who apply to Bolton College request financial assistance. The Freshman Financial Aid Office is charged with making decisions on who shall get aid, how much shall be allocated, and how it shall be "packaged".

That office determines the financial need of each applicant by computing the difference between Bolton College's student budget and the expected "family contribution" for each applicant. This "family contribution" is in turn calculated according to a national needs analysis formula by the College Scholarship Service (CSS) of Princeton, New Jersey. There is, therefore, a standardized way of measuring the need of each applicant and reducing the discrepancies and inequities that could result from other approaches.

For the past three years Bolton College has collected data on approximately 10,000 aid applicants in order to understand how candidates respond to offers of financial assistance. Table I displays the actual "yield" data for this large group, who cover the whole spectrum of possible needs and awards (the definition of "yield" is the ratio of enrollees to acceptances).

The term "gap" in the Table is defined as the difference between need and total aid from all sources allocated by Bolton College. In other words, "gap" is unmet need, or the amount by which a student in a given category is underfunded. All data are displayed as averages, when in actuality they represent different intervals -- the intervals for need being $1,000 and the intervals for "gap" being $500. The assumption (which is valid because of the large number of data involved) is made that in all cases the average is the midpoint of each interval.

The complexity of the above discussion should not be allowed to cloud the extraordinary conclusions that can be drawn from Table I. A priori there is no reason at all to expect that a large aggregate of financial aid recipients should respond in anything like the way they do at Bolton College. Indeed, anyone knowledgeable in the field of financial aid might have expected results more along the lines of Hypotheses A and B in Table II.

On the basis of this information Bolton College can begin to sort out various options in allocating financial aid. The single strategy or combination of strategies finally adopted will be most critical, especially because Bolton College does not have the financial resources to approach meeting the full need of every applicant.

QUESTIONS:

1. What other information would be useful in making strategy decisions for the awarding of financial aid at Bolton College?

2. Based on the following information which of the following strategies makes sense for Bolton College?

   a. Underfund every accepted student by a specific amount
   b. Spread the available aid evenly by offering every needy student accepted a fixed percentage of his or her need
   c. Begin by funding the "best" students with need fully and simply stop when the money runs out
   d. Fund the neediest students first and stop when the money runs out

   Are there any other strategies you can think of?

3. Analyze and discuss Hypotheses A and B of Table II as well as the actual case, Table I. Try to give valid, persuasive reasons why any of these cases might have been expected to apply.

4. Is it possible to develop an operational definition of need, particularly if we assume that the data in Table I could apply at any college or university? Would this definition of need be in conflict with that of CSS?

5. The yield for those who did not apply for financial aid is 40%. Is there any simple formula which will allow Bolton College to maintain a 40% yield across all categories in financial need?

This is obviously not a simple case to understand. I would be willing to discuss it with anyone who is interested prior to our meeting on May 5th. Please call me at Ext. 2524.

Jack Maguire

Appendix B4

TABLE I

(Av) Need ($)

(Av) Gap ($)	(500) 0-1000	(1500) 1001-2000	(2500) 2001-3000	(3500) 3001-4000	(4500) 4001-5000
(250) 1-500	40%	50%	60%	70%	80%
(750) 501-1000	30%	40%	50%	60%	70%
(1250) 1001-1500	20%	30%	40%	50%	60%
(1750) 1501-2000			30%	40%	50%
(2250) 2001-2500				20%	30%
(2750) 2501-3000				10%	20%
(3250) 3001-3500					10%
(3750) 3501-4000					0%
(4250) 4001-4500					
(4750) 4501-5000					

Appendix B4

TABLE II

Hypothesis A

	(Av) Need ($)				
	500	1500	2500	3500	4500
250	40%	38%	36%	34%	32%
750		36%	34%	32%	30%
1250		34%	32%	30%	28%
1750			30%	28%	26%
2250			28%	26%	24%
2750				24%	22%
3250				22%	20%
3750					18%
4250					16%
4750					

Hypothesis B

	(Av) Need ($)				
	500	1500	2500	3500	4500
250	40%	40%	40%	40%	40%
750		38%	38%	38%	38%
1250		36%	36%	36%	36%
1750			34%	34%	34%
2250			32%	32%	32%
2750				30%	30%
3250				28%	28%
3750					26%
4250					24%
4750					

Management Information Systems
Workshop and In-Basket

Bernard W. Gleason
Director
Management Information Systems
Boston College

BOSTON COLLEGE

MANAGEMENT DEVELOPMENT PROGRAM

MIS WORKSHOP

SITUATION: Paul Bell has received all the attached memos: has agreed to the December 1st meeting; and has approximately two weeks to prepare for the conference. Dr. Bell has performed his own analysis and has decided that he needs additional information in a more meaningful format for assistance in the decision making process.

ASSUMPTIONS:

1. The University of Bolton College has had a fully operational Management Information System since 1972 and it should be assumed that any data desired is available in the requested format.

2. Graduate enrollments across all schools will remain constant as planned, and should not be considered for the purposes of this case.

WHAT TO DO:

1. State the problem or problems as it relates to information.

2. Identify the informational needs of the decision maker.

3. Suggest the way in which the data could be organized in a meaningful format to assist in the decision process. Be careful not to compile a vast sea of numbers but rather a pertinent report.

Appendix B5

UNIVERSITY OF BOLTON COLLEGE

DEAN OF FACULTIES

November 15, 1975

Dr. Paul Bell
Executive Vice President
University of Bolton College

Dear Paul:

I'm sure by this time you have read my memo dated November 7, 1975, pertaining to the increasing enrollments in the School of Management. If it is convenient with you, I would like to schedule an all day meeting with you to discuss this matter and other related problems. I would like to suggest December 1st.

My secretary can arrange an appropriate date if you already have a prior commitment. I am very anxious to bring about a resolution prior to the end of the first semester.

Attached you will also find some other recent correspondence that may illuminate the broader problem and provide some interesting facts. If you think it is appropriate I can ask my assistant, Veronica Waterloo, to research the problem and tabulate some data from computer print-outs supplied by the Registrar, Father Forrest. Unfortunately, this could be very time-consuming and the information may not be available in time to address our present crisis.

Please advise me of the course of action we should pursue.

Sincerely,

Charles J. Glinden, S.J,
Dean of Faculties

May 20, 1975

TO: Deans Council

FROM: Rev. Charles Glinden, S.J.

SUBJECT: UAPC Recommendations

During the recently completed Academic Planning process certain limits were established for expected growth as well as measurements for faculty productivity. During our next monthly meeting, I would like to discuss the following recommendations.

1. Student growth will stabilize at the present level.
2. The number of faculty will be maintained at the present level - 520.
3. Each faculty member should teach on the average 525 student credit hours per academic year.
4. Average class size for undergraduate courses should be allowed to rise to 36.

In as much as these recommendations have already been approved, the purpose of the discussion will not be to suggest amendments, but rather to identify possible problem areas.

October 21, 1975

TO: Francis Allen, Dean, A&S

FROM: Samuel Greene, Ph.D., Chairman, Psychology

SUBJECT: Psychology Majors

CC: A&S EPC
Rev. C. Glinden, S.J.

Over the last few years we in the Psychology Department have experienced a steady growth in the number of majors in our undergraduate programs. In 1973-74 we had 120 majors; in 1974-75 170 majors; and this year we will have close to 220 majors. With this continued growth pattern it is reasonable to assume that we will experience a 100% increase in majors by academic year 1976-77.

In contrast the number of faculty slots in the Psychology Department has only risen by 2, from 12 to 14 since 1973. Without a significant increase to say 20 or 21 positions it will be virtually impossible to provide the necessary faculty resources to satisfy major requirements let alone service electives from other departments.

I've spoken to Jim Reynolds in Admissions concerning the possibility of limiting the acceptance of psychology majors. I also have explored the idea of tightening the restrictions on changes of majors with Dean O'Brien of your office. Although Jim and Dave both agreed that some thought should be given to my suggestions, neither felt that they were viable approaches at this time.

As you can see I am deeply concerned about this matter, and I would appreciate your due consideration.

Appendix B5

November 7, 1975

Memo To: Rev. James R. Clifford, S.J. and Mr. Paul Bell

Memo From: Rev. Charles Glinden, S.J.

Subject: School of Management Enrollments

It may have come to your attention that SOM has put a freeze on transfers from within the University to SOM. Dick Murphy dropped in to see me last week and to present us with the problem that, whereas the UAPC had urged that SOM allow class size to rise to 36, according to Dick's figures the average undergraduate class size is perhaps about 45. He claims that the AACSB sets 40 as the upper limit of acceptable enrollment. Hence he feels that it is necessary to cut back on class size.

As a school with a growing population (if this continues) maybe SOM does deserve more faculty. However, A&S increased more than SOM did this year and yet A&S would seem to be the most likely place from which faculty slots could be transferred.

We have a continuing problem in Education, in that it is the most sharply declining in enrollment and, yet, because of failure to reallocate faculty resources and increase faculty productivity, actually economically viable programs in Education are in jeopardy unless they receive further faculty.

We also have a rather pleasant situation in the School of Nursing where academic standards and Admissions applications have, I suppose, accelerated in the past two years. This joy is somewhat diminished by the high cost associated with educating students.

I just thought I would share with you this information and these thoughts. I would welcome any reactions.

November 11, 1975

TO: Rev. Charles Glinden, S.J.

FROM: Harold Lambert, Ph.D.
Dean, School of Education

SUBJECT: Reviews of Spring 1976 Pre-Registration

In reviewing the recent spring pre-registration with SOE Department Chairmen, it was brought to my attention that there was an interesting phenomenon in course demand. Dr. James Curry reported a larger than usual demand for special education courses from students outside of the School of Education. Other Chairmen also expressed the opinion that cross-registration in education courses had increased significantly.

I bring this matter to your attention in light of recent discussions that we have had pertaining to possible decline of undergraduate enrollments in the School of Education.

Appendix B5

UNIVERSITY OF BOLTON COLLEGE

SCHOOL OF MANAGEMENT

Memorandum November 12, 1975

TO: SOM Department Chairmen/
Program Directors

cc: SOM Faculty
C. Glinden, SJ

FROM: Dean

SUBJECT: Registration for Spring Semester 1976

As you know, during the UAPC planning process SOM requested that our average section size be 32.

The UAPC final report recommended that our average section size be 36 students. This average section size has been universally accepted and represents a high level of efficiency. From what I have seen at many other schools it also probably represents the largest average class size at which an upper division undergraduate school, such as SOM, can operate over the long run and still deliver the quality of education which Bolton College represents by its reputation and tuition rates.

This Fall semester, 1975, our average undergraduate section size was estimated at 44.93 students, and we are now operating dangerously close to acceptable accreditation standards. This has occurred even with an increase in the number of sections. A significant cause of this phenomenon is 1409 cross-registrations this Fall semester reported by the SOM Department Managers.

Discussions are underway as to what steps might be taken to bring us into compliance with the UAPC standards upon which our faculty staffing and operating budgets are based.

In the meantime, we should not register in toto any more students than we did this past Fall. If each department/program would establish the number of their Fall semester registrations as their registration ceiling for Spring semester we will still be crowded but at least not endanger our accreditation. Any overall slack which may remain as a result of this procedure will be taken up by transfer students to SOM, internal and external, for which we must reserve some slots. It is anticipated that this policy will remain in effect for the next academic year or until additional faculty slots are allocated.

Richard J. Murphy
Dean, SOm

Student Affairs Case
and
Decision Exercise

Prepared by:
Kevin P. Duffy
Vice President for
Student Affairs
Boston College

TEN SIMPLE DECISIONS

Please indicate whether you AGREE or DISAGREE with each of the following statements by placing an "A" or a "D" in the space to the left.

_____ 1. Women's college varsity sports should be funded at the same level and with the same amounts of institutional resources as men's college varsity sports on a prorated basis determined by the number of participants.

_____ 2. The legal drinking age in Massachusetts should be 21

_____ 3. Incoming freshmen resident applicants should be given University Housing even if this means forcing upperclassmen out of University Housing for one of their four years.

_____ 4. Any resident student responsible for deliberate damage to University property in excess of $100 should be dismissed from University Housing.

_____ 5. The Gay-Lesbian Concern Group should be formally recognized as a student organization at Bolton College as they have requested.

_____ 6. Given the availability of space, Bolton College should establish a Minority Student Center.

_____ 7. If a student is involved in a serious disciplinary matter, his/her parents should be notified by University officials.

_____ 8. Chaplains are the conscience of the University and should speak out on what they perceive Bolton College's stand should be on issues which have a moral dimension.

_____ 9. Student drunkenness should be treated as a disciplinary matter.

_____10. A neighbor directly across the street from the University claims that a University student drove his/her car across his lawn and ruined six hemlock trees valued at $25 each for a total of $150. The neighbor heard but did not see the actual car, although there reportedly were several student cars on the street in front of his house. The neighbor feels the University should reimburse him $150.

Prepared by:
Kevin P. Duffy
Vice President
Student Affairs
Boston College

Appendix B6

MANAGEMENT DEVELOPMENT PROGRAM May 24, 1978

CASE: "....BUT WHERE WILL I SLEEP?"

The following is an actual problem which is currently being addressed by both Admissions and Housing at Bolton College. The outline used in defining the problem and the charge to the MDP sub-committee is based on Richard L. Harpel's article on "Planning, Budgeting and Evaluation in Student Affairs Programs: A Manual for Administrators" (1976).

I. IDENTIFICATION OF THE NEED OR PROBLEM

A. The Demand for University Housing - Over the past nine years, more than 70% of all undergraduate freshman applicants to Bolton College have requested University Housing. In 1977 more than 80% of the 11,000 applicants requested resident status. In addition, a majority of transfer applicants also request University Housing. It is predicted that this demand will continue at approximately the same percentage levels for the coming five years. It is also anticipated that in order to maintain the current undergraduate enrollment, incoming freshmen classes of approximately 2,200 students will be required for the coming five years. In addition, from 200 to 600 transfer students will have to be admitted each year to replenish classes reduced by attrition. If the demands of the market for University Housing were to be fully met, approximately 1,760 resident spaces (80% of 2,200) would have to be provided for incoming freshmen plus a minimum of 100 spaces for new transfer residents. Total predicted peak demand for resident spaces, therefore, would be approximately 1,860 for each group of students entering in September.

B. The Supply of University Housing - In order to meet the demand for University Housint, Bolton College has built or purchased more than 3,000 residence units in the six years from 1970 to 1976, thereby increasing its permanent residence capacity to 4,600. Since the total undergraduate population is 8,400, the University has the capability to house 55% of all undergraduates. No housing is provided for graduate students. The waiting list of current students for University Housing annually peaks in the Fall at 800+ and never drops lower than 300. Once a student is admitted to University Housing, he or she is permitted to return each year until graduation. There is no mandatory requirement for anyone to live in campus housing. Vacancies for incoming students are created by the departure of the senior class plus attrition of underclassmen from March 1 of each year through September 1. It is predicted that this process will yield a maximum of 1,400 resident spaces for incoming students in the Fall of each of the upcoming years.

C. The Problem - The predicted demand for University Housing for incoming Fall classes exceeds the predicted available supply by 460 beds annually. In addition up to 800 other students are on a waiting list also seeking University Housing. Acceptance of a greater percentage of commuter applicants (only 20% of the total pool) would have a serious negative impact on the academic excellence of the incoming class.

II. ENVIRONMENTAL CONSTRAINTS

A. National demographic studies indicate that there will be a significant decline in the number of students of college age in the 1980's. In Massachusetts the 18 year old population will drop sharply from a level of 45,000 eighteen year olds in 1975 to 28,000 in 1985. Boston College has always drawn heavily from Massachusetts for its student body.

B. Recruitment efforts for the local commuter market are probably close to being maximized.

C. Current University practice is that once a student is admitted to University Housing, he or she is permitted to return each year until graduation.

D. In the current University capital campaign, a library and a theater have been identified as the major building priorities.

E. Long-term institutional indebtedness is presently approximately $35 million. The annual operating budget for 1977-78 is approximately $60 million.

F. The off-campus non-university housing market is expensive, limited in quality and quantity, and oriented toward the 12 month tenant. (The University presently provides a Non-University Housing Information Service staffed by one person.)

G. University-owned land for new construction is limited.

H. All new construction would be subject to review and approval by the neighboring municipalities.

III. GOALS

A. To attract and retain a student body of the highest quality.

B. To provide a reasonably secure and comfortable living environment conducive to learning for every student accepted as a resident.

IV. OBJECTIVES

A. To maintain undergraduate enrollment at a stable state of not less than 8,300 students.

B. To balance the University budget on an annual basis including operating Housing on a "break-even" basis.

"The Revolving Door" Personnel Case

Prepared by:
Leo V. Sullivan
Personnel Director
Boston College

The Revolving Door

Background

Charles Murphy has been the Director of Research Administration at Bolton College for the past seven years. Research had played a somewhat low-key position among Bolton's priorities in the past, and consequently, the primary function of the office had been a service-oriented one -- assisting various chairmen and faculty members in the monitoring, processing, and administration of research funding primarily in the areas of hard and natural sciences.

Since Murphy's appointment, he had been a proponent of expanding Bolton's research role and with enthusiastic support of chairmen and faculty who had long cried out for this, he had convinced the administration through vigorous and active efforts on the behalf of the Office of Research Administration, Bolton would and should indeed achieve a notable place among research-oriented universities and colleges by actively seeking out and obtaining research grants and funding.

In response to Murphy's persistent and persuasive proposals, the Executive Vice President and the Research Council agreed, two years ago, to give him the support and the staff to pursue this objective. Along with this approval went the understanding that at the end of four years, the results would be assessed to determine whether or not the University could continue this active research approach or return to its former low-key service priority.

With this green light, Charley had increased his staff. In addition to himself, a Research Coordinator, and a secretary, he now had an Assistant Director and a Program Developer, and two part-time graduate assistants. The Assistant Director, Harriet Murphy, had come into the position two years ago, with a wealth of experience gained in a similar position. Unfortunately, exactly one year later she tendered her resignation. Her husband, a recent graduate of law school, unable to find a position in the Bolton area, could not turn down an excellent offer to work in Chicago. It took Murphy a full two months to find Tom Carney, the replacement. Although Tom had fortunately caught on extremely quickly, he was just now beginning to make a full contribution to the Office's efforts which had been seriously impaired by Harriet's departure.

The Program Developer's position had taken a bit longer to initially fill. Susan McDermott had been hired two months after Harriet. Charley had devoted a considerable amount of time orienting Susan to the Bolton situation, the research faculty, and perhaps most important, the government agencies, their staffs, and the workings of Washington lobbying for research funding.

She now seemed very well accepted on all fronts and Charley could at last feel confident in letting her begin to fly on her own. Her contacts were now beginning to show the encouraging seeds of promise.

Leo Owens, Director of Personnel at Bolton, was glancing over the agenda for the monthly Affirmative Action Council meeting scheduled to start in half an hour, when his secretary appeared in the doorway. "Leo, Charley Murphy's here - wants to know if you have a few minutes." "Sure, tell him to come on in." Leo replied, picking up his can of Tab.

Charley came in and the usual good-natured banter was exchanged. Leo and Charley had worked together for a number of years and a good friendship had evolved from it. "Well, Leo, I've really got a problem I want to talk to you about. You remember what we went through when Harriet left? Well, we recuperated -- just barely, I might add -- you know the pressure I'm under to sell what I proposed. I've only got two more years to prove my point, and that really set me back. I admit it wasn't anybody's fault -- let's face it, I sure didn't expect Harriet to say goodbye to her husband and family and stay on here. That's a fact of life. But look what hit me yesterday!" Charley unfolded the letter in his hand and passed it to Leo, who knew by the look on Charley's face that there indeed was a problem.

February 18, 1976

Dear Mr. Murphy:

It is with a great deal of regret that I must write you this letter. As you know, when I accepted this position, it was with a great deal of enthusiasm and a good faith commitment to contribute to the challenge ahead, not just for the four critical years, but believing in their success, for the foreseeable future.

Unfortunately, my husband Bill has been offered the position of Vice President of Marketing for XYZ Corporation for whom he has been the Regional Sales Manager for five years. I'm sure you will understand that it is impossible for him to turn down this opportunity which will necessitate our moving to Detroit.

As a result I must regrettably resign my position as of the end of March.

Sincerely,

Susan McDermott

Leo put the letter down. "Charley, can I get you a Tab?" "No, thanks. Leo, what can I do? No, I know what I can do -- find a replacement as soon as I can. I guess what I really wanted to talk to you about is what I can't do and I've just got to put my cards on the table. I feel I can with you and that it's not going to go any farther than this room. Leo, I don't blame my secretary for getting married and leaving last year. I don't blame Harriet for taking off. I don't blame Sue for this thing either. But no one can blame me for not being willing to be a training department either!"

"What are you saying, Charley?" "To be blunt," replied Charley, "What I'm saying is, don't send me any more female applicants. I know what you're going to say, but wait a minute. I've broken my back training two women professionals, and they were worth it, I'm not saying they weren't. But just when both were ready to really realize a payback to the project - bam! They're gone, and so is all the time, money and investment. Now I'm almost back where I started."

"Charley, I hear what you're saying, but you know we can't turn away qualified women applicants."

"Leo, all I'm saying is that I'll play the Affirmative Action game if I have to, and you know I can still come out with a man for the job, so why waste your time, my time, and female applicants' time?"

"Charley, I'm sorry to have to cut you off, but I'm late for a meeting. Let's sleep on this and get together tomorrow morning -- how about ten?"

"OK, Leo, but you can talk till you're blue in the face -- I've done more than my fair share in this affirmative action bit -- now I can't afford any more risks. I've got a job to get done."

Leo thought over the conversation as he was walking across campus. Not insignificant in his mind was a talk he had a couple of months ago with a member of the Affirmative Action Office about career paths. One of the possibilities and interests June O'Leary had mentioned was the Research Administration Office. You could bet she'd be one of the very first to respond to the internal posting of Susan't job. And Leo knew she could handle it.

When Leo came back to his office after the meeting, he returned a phone call from Charley's secretary.

"Hi, Phyliss, what's on your mind?" "Oh, nothing much Leo, but Charley seems so preoccupied, and I know he's upset about something, so I thought I'd ask you this instead. I don't want to add to Charley's problems, at least not till I have to. I've been looking at the employee handbook. Just exactly what is Bolton's maternity leave policy?"

"Phyliss, can you hold on a minute. I just want to go grab a Tab."

Meeting Role Play

Prepared by:
Raymond F. Keyes
Associate Professor
School of Management
Boston College

Appendix B8

University of Bolton College

Walnut Valley Campus

TO: Richard Chaisson, Director of Admissions
Alice Greene, Assistant Controller
Harold Lynch, Director of Student Affairs
Ronda O'Brien, Assistant Professor of English
Arnold Pease, Professor, School of Management

FROM: Dr. Paul Bell, Executive Vice President

SUBJECT: Benefits Review Committee

In recent months I have received several specific recommendations requesting changes or extensions in the University benefits program. These recommendations are quite diverse, covering such areas as educational benefits, health and dental coverage, early retirement and pension provisions, vacation and sick day allowances, holidays, etc. In view of the fact that we have financial constraints within which we must work, it is important that we provide the best possible mix in our benefits program to respond to the needs and priorities of our faculty and professional staff.

With this in mind, I am establishing a Benefits Review Committee to review our current programs, to evaluate various alternatives to the program, and to provide me with specific recommendations. Richard Chaisson has agreed to serve as Committee of the five member committee composed of faculty members and administrators. In addition, John Burns, our Benefits Coordinator, will be on call as a resource person.

Thanks again for agreeing to work on this committee. I look forward to your early recommendations. Rick Chaisson will contact you directly concerning an initial meeting.

PB:jk

Appendix B8

University of Bolton College

Walnut Valley Campus

Admissions Office

TO: Alice Greene
Harold Lynch
Ronda O'Brien
Arnold Pease

FROM: Richard Chaisson

SUBJECT: Benefits Review Committee - First Meeting

We have checked individual schedules and determined that the best time for a meeting appears to be next Friday morning at 10:00 A.M. Let's plan to meet here in my office, Moody 305.

Please call my secretary if you are unable to make this meeting.

COMMITTEE MEMBERS

Dick Chaisson, Chairman
Admissions Director

38 years old	10 years at Bolton College

Married, three children (12, 10, 6)
Happy with career at Bolton College. Sees bright future - good academic opportunities for family.

Harold Lynch
Assistant Director, Student Affairs

27 years old	2 years at Bolton College

Recently married, no children
Enthusiastic about career opportunities in educational administration. Currently taking graduate courses in the Higher Education Program.

Ronda O'Brien
Assisant Professor, A&S

34 years old	5 years at Bolton College

Single
Respected junior faculty member in English Department - PhD - active spokesperson for women's rights in higher education.

Arnold Pease
Professor, School of Management

60 years old	27 years at Bolton College

Married, 3 grown children
Veteran member of Marketing Department. Long career at Bolton College includes extensive service on significant university and School of Management committees.

Alice Greene
Assistant Controller

45 years old (estimated)	15 years at Bolton College

Single
Loyal member of Controller's Office for 15 years. Excellent worker. Enjoys people - has many friends at Bolton College.

Appendix B8

Instructions for Committee Members

In this role playing exercise, our objective is to demonstrate "how not to have a meeting". The over all meeting structure and the individual member "roles" are designed to dramatize particular problem situations which are not uncommon in meetings. Against the background of a poor meeting, we should be able to get the group to identify and discuss some of the ways of handling certain problem situations that develop in many of our meetings.

The Situation

In this exercise, the Committee Chairman's role is designed to dramatize the situation that develops where there is inadequate preparation and ineffective conduct of a committee meeting. The Committee member roles are supposed to exemplify various "problem participants" who attend our meetings.

The role play is set up around a simple problem-solving task - presented in the form of a letter from Dr. Paul Bell to five faculty and staff members asking them to review the University benefits package and to make recommendations for changes. (see attached) The seminar group will be given the Bell letter plus a brief biography of each participant (also attached). They will be asked to observe the role playing exercise and to take votes on specific problem areas as they see them develop in the exercise when the role playing (meeting) has gone on long enough to exemplify some key problems, the seminar group will follow up with general discussion of the problems and various ways that a leader might respond to such problems.

Committee Member Roles

Each of the Committee members is provided with additional information on his/her specific role (see attached). These roles are briefly identified as follows:

1. Committee Chairman - Richard Chaisson - "Relaxed Richard"
2. Committee Member - Harold Lynch - "Helpful Hal"
3. Committee Member - Ronda O'Brien - "Wrong Subject Ronda"
4. Committee Member - Arnold Pease - "Argumentative Arnold"
5. Committee Member - Alice Greene - "Agreeable Alice"

Please read your own role and also the roles of your fellow committee members.

Scenario

Committee Chairman Richard Chaisson begins the meeting in an informal, unstructured way:

- He has no agenda
- He has no information for the members other than the letter from Dr. Bell

- He may even waste time at the outset by engaging in small talk about some matter completely unrelated to the topic at hand
- When he does actually get down to the topic, he provides almost no direction other than a statement along such lines as: "Well, we've all received the memo from Paul Bell, let's get down to business and talk about this problem."

At this point, Relaxed Richard loses control of the meeting and the various members begin to contribute in line with their roles.

- "Helpful Hal" Lynch homes right in on his "pet idea". He dominates the first part of the meeting by pushing for one specific benefit in the area of tuition remission for graduate courses.

- "Wrong Subject" Ronda takes over. She addresses the area of equality of benefits for women - but very quickly expands the discussion to the broader problem of discriminatory practices in the areas of hiring and promotion.

- "While Hal and Ronda are talking, "Agreeable Alice" is very supportive in her agreement with everything that is said. On the other hand, "Argumentative Arnold" remains aloof from the whole discussion - bored, indifferent, superior.

- Finally, Committee Chairman Chaisson inserts himself into the discussion by asking Arnold if he has any ideas. At this point, Arnold takes off in his argumentative manner. As far as he is concerned, there is nothing right about the benefits program. It places much too much emphasis on "instant benefits" and not enough attention is directed to long run retirement and pension benefits. This is his "pet peeve" and he doesn't mind griping about it.

- At this point, it might be possible to develop a little personality conflict between "Argumentative Arnold" and "Wrong Subject Ronda". They agree to disagree and establish clear positions in opposition to one another.

- From time to time, Agreeable Alice is asked to contribute, but her response is either to agree with what is being said or to turn the question by asking for someone else's point of view.

- If possible, during the course of the meeting, Alice and Hal should try to break off in a side conversation which disrupts the meeting and distracts the other participants.

Since a role playing exercise is not a play, the exercise may not follow the sequence outlined above. Be spontaneous and creative. The situations will develop.

Role #1

Appendix B8

Committee Chairman Richard Chaisson
"Relaxed Richard"

As Chairman of the Committee, your role will exemplify weak preparation and leadership. Beyond setting a time for the meeting, you have done nothing to prepare. You have no agenda. You haven't done any research on the existing benefits program. You haven't contacted John Burns, the University Benefits Coordinator.

In conducting the meeting, you show little skill in establishing direction or in handling problem participants. From time to time, however, you may assume your Chairman's duties by getting different people to participate along the lines outlined in the Scenario.

Committee Member Harold Lynch
"Helpful Hal"

You are a young, enthusiastic staff member. You feel you have good career opportunities at Bolton College. In support of your career goals, you are taking courses in the Higher Education Program but you are obliged to pay for these courses. You would like to see the University establish an educational benefit for its administrative personnel which would provide for full tuition remission for all course work in graduate level courses. You feel that since most businesses provide such educational benefits to employees, why not Bolton College?

You are so concerned about this specific benefit (which would meet your own current needs) that you aren't really considering the total benefits problem.

You are an enthusiastic participant in the meeting. In fact, you are the first person to respond to the Chairman's invitation to discuss the problem. However, you tend to dominate the early portion of the meeting with your "pet idea".

As the meeting progresses, you should look for an opportunity to engage in a side conversation with Alice Greene. This side conversation is designed to provide a brief distraction in the meeting.

Role #3

Appendix B8

Committee Member Ronda O'Brien
"Wrong Subject Ronda"

You are a sincere, committed advocate of women's rights. As a junior faculty member, you are concerned with equal opportunities in such areas as hiring, salaries, promotion, etc. Because of your broad interests in this area, you tend to focus in on women's rights at every opportunity. In this instance, the topic is "benefits". You begin by recognizing the importance of equality in the benefits area - pensions, sick leave, etc. However, once started in your favorite area, you expand the discussion into areas of discriminatory practices in hiring, salaries, promotions, etc. While the broader topis is important, it does get away from the immediate subject at hand - the benefits package.

As the meeting progresses, you should take exception to some of Arnold's statements. Make it evident that there is a personality conflict there. Try to get various committee members to side with you against Arnold.

Committee Member Arnold Pease
"Argumentative Arnold"

You have been around the University for almost 30 years. You have been on hundreds of committees and you find most of them are a crushing waste of time.

At the beginning of this meeting, you are bored and indifferent. You have been here a thousand times before. Why do you have to get picked for these Mickey Mouse committees?

You aren't getting any younger. At 60 years of age, you are concerned about your future retirement. You don't want to retire and you are worried about your financial situation in the face of this period of rampant inflation. You resent these younger faculty and staff members who are creating more and more pressure on veteran faculty members to retire early. You feel that the increasing presence of women on the Bolton College faculty is emphasizing the problem for older faculty.

When Committee Chairman Chaisson asks you for your views, you have no hesitancy in expounding on your "pet peeve". You believe strongly that too much attention is placed on "instant benefits" - vacation time, educational allowances, maternity leaves, dental coverage, etc. You believe that more resources should be channeled into pension and insurance benefits. This is where you are.

You don't have any trouble disagreeing with Ronda O'Brien over women's rights. Equalization of pensions, for example, is just another example of the impact of women on your situation. The more they get, the less you get. You definitely have a personality conflict with Ronda.

Committee Member Alice Greene
"Agreeable Alice"

You are a loyal, friendly, agreeable, nice person. You don't like to offend people by taking sides. You don't like to express opinions or present ideas because other people might disagree.

As a result, your participation in the meeting is completely non-productive. You agree with everyone. You refuse to contribute any ideas or suggestions. You try to turn questions aside by asking other people what they think.

At one point in the meeting, you should try to engage in a side conversation with Hal Lynch. This side conversation is designed to create a distraction in the meeting.

Appendix C

Program Evaluation Form and Survey

Appendix C1

BOSTON COLLEGE

Management Development Program

PROGRAM EVALUATION

Part I: Program Objectives

The following objectives were established for the Management Development Program:

1. To encourage our administrators and managers to understand and identify with our Jesuit tradition, educational ideals and institutional objectives.
2. To broaden their views of the University organization and functions and to stress the importance of the interdependence of these functions.
3. To examine the key elements of the management process and their application to the management of educational institutions.
4. To study financial management in higher education in order to better understand sources and uses of funds, financial practices, control procedures, management information systems and financial planning.
5. To explore the questions and problems relating to human behavior in the academic environment including organizational theory, interpersonal relationships and personnel management.
6. To encourage the development of skills which are useful to managers in the performance of their responsibilities.

PLEASE EVALUATE THE PROGRAM IN LIGHT OF THESE OBJECTIVES.

____
Respondent

MANAGEMENT DEVELOPMENT PROGRAM

PROGRAM EVALUATION

For each of the sessions, please indicate by checking in the appropriate column your view of its value in the Management Development Program.

		Excellent	Good	Fair	Needs Improvement
Unit 1	University Objectives				
2	Organization, Functions, Relationships				
	a) An Overview				
	b) Executive In-Basket				
3	University Governance				
4	University Planning				
5	Academic Administration				
6	Financial and Business Operations				
	a) Organization				
	b) Budgeting				
	c) Long-term Financing				
7	Enrollment Management				
8	Management Information Systems				
	a) Introduction				
	b) Applications				
	c) Computing Center				
9	Behavior in Organizations				
10	Management in Student Life Service Areas				
11	University Personnel Relations				

Appendix C1

For those sessions which were evaluated as Excellent or Needs Improvement please indicate on the reverse side of this page the reasons why you evaluated the session in such a manner. Include comments on readings and presentation. If a session has been rated as Needs Improvement, please include recommendations to improve the session.

Appendix C1

Program Evaluation

Part II - Assignments

Please review the various homework assignments (articles, cases, hand-outs, etc.) and comment on the following:

1. Was the amount of outside work reasonable?
2. Were the assignments helpful in understanding the material presented in the sessions?
3. Please list the articles or readings which you found least helpful. Should these articles be removed from subsequent assignments?
4. Are there any articles or readings that you are familiar with that you would recommend for inclusion in subsequent sessions?

Part III - Program Logistics

Please comment briefly on the various aspects of the program arrangements listed below:

1. Length of program (number of units, number of meetings)
2. Initial overnight meeting at Endicott House.
3. Timing of weekly meetings.
4. Physical arrangements.
5. Meals.
6. Size of group.
7. Other (can you make any suggestions which would improve the arrangements or scheduling aspects of the program?)

Part IV - General

1. Are there any specific areas or portions of the sessions which you feel we should de-emphasize or possibly eliminate from the program?

2. Are there any areas that you feel we should add to the program?

3. In our initial program we have tried to provide a basic introduction to several important areas of the University Management. We have not been able to cover any area in depth. At some future date, we might proceed further by offering courses in specific areas. If we were to do so:

   a) Would you be interested in participating?

   b) What area or areas would you want to learn more about?

4. General Comments.

Appendix C2

Boston College, Chestnut Hill, Massachusetts 02167 Telephone (617) 969-0100

November 10, 1978

TO: Vice Presidents
Deans
Directors

FROM: Raymond F. Keyes

Dear Colleague,

As you know, we are in the fourth year of the Management Development Program for Boston College administrators, professional staff and interested faculty. To date, we have had 148 participants in seven sessions of the basic (MDPI) program. In addition, we plan to continue scheduling approximately six follow-up sessions per year (MDPII) to cover topics of specific interest to our graduates.

It has been our practice to ask our participants to provide us with written and oral program evaluations at the end of each session. These evaluations generally have been positive and constructive - and have provided us with useful guidelines for making program changes and improvements. At this point in time, however, we are seeking a broader perspective in the program evaluation. We are interested in receiving feedback from key supervisory personnel, as they observe results of the program reflected in the attitudes and performances of their own subordinates who have participated in the program.

We would appreciate it if you would spend a few minutes completing the attached questionnaire. Your observations and recommendations will provide important information, as we review the future emphasis and direction of the Management Development Program.

Sincerely,

Ray Keyes

Raymond F. Keyes

RFK:brk

I. Program Objectives

The overall objective of the Management Development Program is to further strengthen the University by improving current and future management performance through a program of formal management education. Specific subobjectives of the program are:

(1) To encourage our administrators and managers to understand and identify with our Jesuit tradition, educational and ideals and institutional objectives.

(2) To broaden their views of the University organization and functions and to stress the importance of the interdependence of these functions.

(3) To examine the key elements of the management process and their application to the management of educational institutions.

(4) To study financial management in higher education in order to better understand sources and uses of funds, financial practices, control procedures, management information systems and financial planning.

(5) To explore the questions and problems relating to human behavior in the academic environment including organizational theory, interpersonal relationships and personnel management.

(6) To encourage the development of skills which are useful to managers in the performance of their responsibilities.

Questions:

1. Do you feel that the objectives of the program are adequate?

___ Yes

___ Yes, but they could be expanded to include____________

____

___ No Too Broad ___
Too Narrow ___
Not realistic ___

Page Two

2. From your observations and discussions with program participants, do you feel that the program accomplishes its objectives:

___ yes
___ Yes, but it is weak in the area of __________
___ No

Comments:

II. Program Strategy

Our strategy in the development and presentation of the program has incorporated the following key elements:

1. Utilization of volunteer internal management personnel, and selected SOM faculty in designing and presenting individual sessions.
2. Emphasis on the Boston College environment as the "live case" for presentations, problem identification, and discussion.
3. Heterogeneous mix of participants to encourage better understanding of and communication among the various functional areas within the University.

Questions:

1. Do you feel that this strategy is appropriate for the kind of program we are offering?

___ Yes
___ Yes, but you might consider altering the strategy to include:____________________________________
___ No

Comments:

III Program Impact

While difficult to assess, perhaps the true measure of a program's effectiveness is reflected in subsequent job performance and, where appropriate, attitude changes on the part of the participants.

On the basis of your experience with your own staff members who have participated in the Management Development Program, which of the following would most closely describe your reactions:

___ The program has had a noticeable, positive impact on my personnel in terms of things like knowledge of the University, morale, performance on the job, and attitude development.

___ The program has had a moderate impact best described as a "mixed result". For some people, it has been helpful, for others, not especially so.

___ The program has had little or no observable impact.

Comments:

IV Recommendations

What recommendations would you make in terms of future direction and emphasis of the program?

(We would appreciate your suggestions concerning continuance or non-continuance of the basic MDPI program as well as your thoughts about significant areas for coverage in the follow-up sessions in MDPII.)

Please return by December 1st,
via Campus Mail, to
Professor R. Keyes Fulton 304

____
Name of Respondent

____
Date

Appendix C3

BOSTON COLLEGE
CHESTNUT HILL, MASSACHUSETTS 02167

EXECUTIVE VICE PRESIDENT

January 22, 1979

TO: Frank B. Campanella

FROM: Raymond F. Keyes Ray

SUBJECT: MDP Supervisory Questionnaire

The purpose of this memo is to provide you with the results of our recent survey of key supervisory personnel concerning their reactions to the Management Development Program for Boston College administrators and professional staff. I am including a copy of the letter and questionnaire as Attachment D.

We received 24 responses out of 59 people on the mailing list. Some of the people on the list do not have subordinates who have participated in the Program. I estimate that we have about 33 people on the list who were in a position to respond. We received 24 responses from these 33 people, which is a good response rate. We received responses from each of the Vice Presidents.

As we anticipated, the overall response to the questionnaire was positive - see Attachment A. This is consistent with the results we received from the participant evaluations. Many of the respondents did include significant comments and recommendations which I have attempted to summarize in Attachment B.

One of the on-going questions which we must ask is whether the time invested by key university administrators is justified on a continuing basis. An answer to this question is found in the various observations made by our participants, particularly as they reflect their feelings about Father Monan's presentation. I have included a sampling of these observations in Attachment C.

Hope these results are helpful to you in terms of your own evaluation of the Program, Frank.

RFK:jk

Attachment A

December 1978

Supervisor Evaluation - MDP Program

QUESTION	YES	YES BUT	NO	CAN'T JUDGE
Question 1: Program Objectives				
1. objectives adequate	16	5		3
2. does program accomplish its objectives?	19	2		3
Question 2: Program Strategy				
1. strategy appropriate?	16	5		3
	Noticeable Impact	Moderate/Mixed	Little Or No Visible	
Question 3: Program Impact	10	6	0	8

Attachment B

SUMMARY OF COMMENTS AND RECOMMENDATIONS FROM QUESTIONNAIRES

Question 1 A: Objectives of the Program

- more emphasis on academic functions
- should include discussion of alumni body, fund raising activities, and involvement with external groups
- should include "sense of community or collegiality" as an objective
- should include such as: "To develop a sensitivity to the University as a total learning environment which has as a central objective the growth and development of the individual student."

Question 1 B: Accomplishment of Objectives

- some people feel that there is too great an emphasis on management and not enough stress on education - presentations should emphasize the direct relationship between more effective management and the improved achievement of educational goals, institutional objectives, and Jesuit ideals
- need more participation of academic administrators
- Dean's session, put together some "cases"
- there is no doubt in my mind that the program accomplishes its objectives
- more financial and/or computer systems coverage at additional sessions
- participants should make a 100% commitment to preparation and attendance

Question 1 C: Program Strategy

- continue case study approach, more workshops
- more outside "experts"
- develop more "live cases"
- greatest single benefit of MDP is the unique opportunity which it affords to meet a cross-section of university administrators, professional staff, and faculty - appreciation for the complex programs and dedicated people
- use of internal management people and SOM faculty is good - perhaps more new blood for following sessions
- no better live case than BC
- I do not want to see outside experts included.

Question 3: Program Impact

- overall, positive impact on my people - benefit realized depends on the individual initiative supplied by the people participating - overall benefits have been and continue to be very valuable
- most useful contribution has been the greater knowledge of the University
- major impact has been the acquisition of a broad knowledge of university functions and the people contact
- MDP combats myopia and fosters University-wide perspective
- the opportunity to spend an afternoon and an evening reflecting with the President, to spend the equivalent of a couple of days with the Executive Vice President, and hear someone such as Peg Dwyer share first-hand observations on the operations of the President's Office and the Board of Trustees -- these are unique opportunities which most middle management administrators would never otherwise have
- hard to measure but alumni of MDP have a greater understanding of their own role in relation to the goals and objectives of the University
- one of the greatest benefits has been the opportunity to meet peers from functions
- I believe a major reason for the Program's success is that we have not brought in "outside experts" but have relied on our own considerable talent, people who know first hand what they are talking about when talking about BC.
- program has become a focal point for a certain esprit de corps among former participants - it fosters greater professionalism

Question 4: Recommendations

- program has largely shifted toward people who could be classified as closer to entry level rather than middle-managers -- wonder if it should be given as often with the same format for people with perhaps less than five years of work experience
- continue with MDPI Program, schedule one full day in-depth sessions for those who would like to go deeper into the areas covered
- perhaps more emphasis could be placed on Long Range Planning and resource allocation
- I certainly hope MDPI continues. There are people who have not been able to get into the program but who would like to.
- with staff turnover, I see MDPI as an on-going event - suggest more faculty (Department Chairmen) become involved
- more emphasis on time management, personnel/interview techniques, data processing in MDPI
- Perhaps MDPI may have to be offered only once per year.
- topics for MDPII - time management, effective office management, career planning seminars
- Several people commented that it should be run only once per year at this stage.
- Please continue the MDPI sessions -- MDPII programs have been a logical follow-up of the original format.
- work order and purchase process deserves a little attention and clarification

Question 4: Continued

- more discussion of the academic side of the university
- MDPI will probably become a new employee orientation program - basic format may have to be adjusted - once per year
- MDPII sessions have been very valuable - think their focus should continue to be specific skill development
- It might be good to have Jesuits truly articulate why we are different because we are Jesuit.
- more feedback to non-professional teachers

Appendix D

MDP II Descriptive Materials

Appendix D1

Boston College, Chestnut Hill, Massachusetts 02167 Telephone (617) 969-0100

EXECUTIVE VICE PRESIDENT

November 8, 1977

TO: Alumni and Alumnae of the Management Development Program

FROM: Frank B. Campanella

SUBJECT: MDP II

This is just a reminder that the Management Development Program registration reception is going to be held on November 30, 1977 at three o'clock at Putnam House.

Based on the responses that we have received from you to date, we have scheduled five MDP II electives as noted below.

	Date	Session	Instructor
1.	December 14	Personnel - Performance Evaluations	Leo V. Sullivan
2.	January 11	University Relations	James P. McIntyre
3.	February 15	University Governance	Evan R. Collins
4.	March 15	History of Boston College	Charles F. Donovan, S.
5A.	April 12	Decision Making: Financial Planning	Frank B. Campanella
		and	
5B.	May 10	Decision Making: Application	Frank B. Campanella

You will have an opportunity to register for these sessions on November 30th but I thought you would appreciate knowing the prospective dates prior to that time

Sincerely,

Frank Campanella

Frank B. Campanella

FBC:jk

Appendix D1

BOSTON COLLEGE
CHESTNUT HILL, MASSACHUSETTS 02167

EXECUTIVE VICE PRESIDENT

October 19, 1977

TO: Alumni and Alumnae of Management Development Program I

FROM: Frank B. Campanella

SUBJECT: Management Development Program

As we begin the third year of the Management Development Program, we are again planning sessions for both the Fall and Spring semesters. Each session will include just over twenty participants as in the past. Although the basic program has been modified a little with each new class, it has remained substantially the same through this point in time. This Fall, however, we will add a completely new session on the topic of University Governance taught by Van Collins.

Attached to this letter is an MDP Newsletter assembled by Ray Keyes. Its purpose is to update you and to keep you apprised of new plans for Management Development. The big news for the Fall is the introduction of MDP II. Note that there is a form attached to the MDP Newsletter inviting you to an MDP II Registration/Reception on November 30 at 3:30 P.M. at Putnam House. Please complete this form and return it to my office. Note as well, that MDP II sessions will be held on selected Wednesdays at Putnam House, following the MDP I 12:00 to 5:00 format, with which you are familiar.

For your general information I have enclosed a list of all of those who have completed the MDP I program, including the participants in this Fall's session.

Best wishes. I hope you will be able to join us on November 30th at Putnam House.

Sincerely,

Frank B. Campanella

Dr. Frank B. Campanella
Executive Vice President

FBC:brk

Enclosures (3)

Appendix D1

BOSTON COLLEGE

MANAGEMENT DEVELOPMENT PROGRAM

NO. 1 NEWSLETTER October 1977

A NEW PROGRAM -- MDP II

This year, we plan to extend our Management Development Program for those who may wish to continue on for added professional development and perhaps some social interaction as well. In our efforts to plan MDP II, we considered and rejected the idea of a formal in-depth structure and sequence of offerings along the lines of MDP I. Instead, we opted for a format which is more flexible and more responsive to your expressed interests. MDP II, therefore, has been developed as a program of "electives", so to speak, which will be a logical extension of our "core" MDP I program.

APPROACH

Our basic approach will be as follows:

1. We will schedule advanced sessions approximately once a month - five or six meetings this academic year. If there is sufficient interest, we will also schedule additional sessions in more specialized areas.
2. Meetings will be at Putnam House on Wednesday Afternoons - Buffet lunch will be from 12:00 - 1:00 and sessions from 1:00 - 5:00.
3. Sessions will be conducted as electives and will be responsive to your expressed interests. Duplicate sessions will be run where there is sufficient demand.
4. If the program is successful this year, it will continue next year covering those areas which we are not able to schedule this year, adding new topics or repeating successful ones.
5. Where possible, we will attempt to mix persons from the previous MDP groups in order to encourage broader interaction and understanding among administrative units.

OVERALL FRAMEWORK

While we do not have a formal course structure and sequence, we do have an overall framework in mind in organizing the various electives. These electives will fall generally into three main areas:

OVERALL FRAMEWORK Cont'd.

I. THE UNIVERSITY

- Distinctive role of the Catholic University
- Jesuit tradition and Boston College History
- Academic purposes and programs
- Participants in university governance

II. UNIVERSITY OPERATIONS AND SERVICES

- Key University functions - e.g. External Relations, Development
- University resources - library, personnel, chaplains
- Financial planning
- Etc.

III. MANAGEMENT STYLE AND PERSONAL SKILL DEVELOPMENT

- Management of professional people
- Developing personal management and leadership styles
- Workshop sessions on specific skills such as:
  - Time Management
  - Budget Preparation
  - Communication
  - Supervision
  - Interviewing
  - Performance Appraisal
  - Math for Managers
  - Etc.

TENTATIVE OFFERINGS

To give you an idea of the kind of sessions we are thinking about, here are some possibilities:

I. THE UNIVERSITY

- Father Donovan, anticipating his new role as University Historian (commencing July 1978) has agreed to make a presentation on the history of Boston College.

- Father McBrien, Director of the Religious Education Institute, has agreed to lead a discussion on Catholic education against the background of his excellent Commonweal article on this subject.

- Van Collins will present sessions on University Governance and Academic Purposes and Programs.

II. UNIVERSITY OPERATIONS AND SERVICES

- Several people have requested that we have a session on University Relations including the Development, Public Relations and Alumni operations. Jim McIntyre and staff are standing by.

TENTATIVE OFFERINGS CONT'd.

II. UNIVERSITY OPERATIONS AND SERVICES Cont'd

- Our MDP I graduates from the Library area are interested in putting together a session on the library research services which are available to assist administrators in problem solving.
- Many people have suggested additional coverage in personnel areas including personnel policies and procedures, hiring and training new employees, supervision, performance evaluation, development of professional staff and clerical staff, manager's role in grievances, benefit administration, and services available through the Personnel Office. Leo Sullivan and his staff are willing to present several of these subjects.
- Frank Campanella has a hands-on-project to introduce the financial planning model as a tool to assist in university decision making.

III. MANAGEMENT STYLE AND SKILL DEVELOPMENT

We visualize some individual workshops which could be run for interested people in such areas as:

- Budget preparation and administration
- Management Style and leadership
- Time management
- Affirmative Action
- Collective bargaining (role playing exercise)
- Interviewing, coaching, performance appraisal
- Math for Managers
- Communication - oral and written
- Developing subordinates
- Interpersonal relations
- Management of professional people
- Administrative Upmanship (group exchange)

SCHEDULE

The monthly meetings will normally be scheduled on Wednesday afternoon for those topics which are of general interest. In addition, some of the specialized workshop sessions may be offered on alternate Wednesdays, or at other specially arranged times.

PUTNAM HOUSE

During the summer Putnam House was somewhat refurbished and partially furnished. This will enable us to run several meetings simultaneously. We will be running the MDP I meetings again this year on Wednesdays along with the MDP II electives. Work is still going on at Putnam House but we expect it to be completed by early November.

INVITATION

This, therefore, is your invitation to join us at Putnam House on November 30 for a registration-reception. We will have more details on the MDP II electives at that time and we hope, in the meantime, that you will be able to signify your interest in the various areas proposed here.

This is also an invitation to any of you who would wish to act as session leaders for specific electives or workshop sessions. This is your chance to develop and run a session on your favorite management-oriented subject. Please give us a call if you are interested. Also, please let us know if you have any suggestions concerning other topics and/or persons who would be good session leaders.

****

We are pleased to note that Van Collins has agreed to work with us in the Management Development Program this year. Van is helping us plan the program and he will be one of our key seminar leaders. Peg O'Leary will also be working with us in program design and administration. Peg is the person to contact concerning arrangements, schedules, questions and problems. Welcome aboard, Peg and Van!

Hope to see you all on November 30th.

Ray Keyes

Appendix D1

MANAGEMENT DEVELOPMENT II

Yes, I would be interested in the following topics (check preferences):

I. The University

_____ History of Boston College and its Jesuit Tradition
_____ Discussion on Catholic Education
_____ University Governance
_____ Meet a Trustee

II. University Operations and Services

_____ University Relations (Development, Public Relations, Alumni)
_____ Library Research Services available to Administrators
_____ Personnel (policies & procedures, hiring & training new employees, supervision, performance evaluation, etc.)
_____ Management Decision Making - hands-on project to introduce financial planning

III. Management Style and Skill Development

_____ Budget Preparation
_____ Management Style and Leadership
_____ Time Management
_____ Affirmative Action
_____ Collective Bargaining
_____ Effective Interviewing
_____ Math for Managers - Getting Comfortable with Numbers
_____ Communication - Oral and Written
_____ Developing Subordinates
_____ Interpersonal Relations
_____ Management of Professional People
_____ Administrative Upmanship (group exchange)

IV. Other Areas (Please indicate other areas of interest to you giving name of suggested discussion leader if possible).

____

____

_____ Yes, I will be able to attend the registration-reception at Putnam House on Wednesday, November 30 from 3:30 to 6:00.

_____ No, I will not be able to attend but will register at a later date.

NAME______________________________

Please return by October 30 to Peg O'Leary, Botolph House

BOSTON COLLEGE

MANAGEMENT DEVELOPMENT PROGRAM

No. 2 NEWSLETTER November 1978

MDP II

Again this year, we will be offering several advanced sessions in our Management Development Program II. To date, we have over 140 graduates of our basic Management Development Program. Our purpose in MDP II is to explore additional topics in response to the expressed interest of our graduates. MDP II does not have a formal course structure and sequence. We think of it as a program of "electives", which is offered as an extension of the "core" MDP I Program.

APPROACH

Our approach will continue as follows;

1. We will schedule approximately six advanced sessions this year.
2. Meetings will be at Putnam House on Wednesday afternoons - buffet lunch will be from 12:00 - 1:00 and sessions from 1:00 - 5:00.
3. Sessions will be conducted as electives and will be responsive to your expressed interests. Some sessions will be repeated if there is sufficient demand.
4. Interest and participation in the sessions will determine whether the Program will be continued next year. A continuing program will cover areas which we are not able to schedule this year, adding new topics or repeating successful ones.
5. Where possible, we will attempt to mix persons from previous MDP groups, in order to encourage broader interaction and understanding among administrative units.

OVERALL FRAMEWORK

While we do not have a formal course structure and sequence, we do have an overall framework in mind in organizing the various electives. These electives will fall generally into three main areas:

1. The University
   - Distinctive role of the Catholic University
   - Jesuit tradition and B.C. History
   - Academic purposes and programs
   - Participants in university governance

2. University Operations and Services
   - Key University functions - i.e. External Relations
   - University resources - library, personnel, chaplains
   - Financial planning

3. Management Style and Skill Development
   - Management of professional people
   - Developing personal management and leadership styles
   - Workshop sessions on specific skills such as time management, budget preparation, communication, supervision, interviewing, performance appraisal, math for management, etc.

PROGRAM OFFERINGS

Session #1 - Personnel Skills Workshop — December 6, 1978

This session will consist of four separate workshops covering various personnel skills. Each workshop will be of 1½ hour duration and will be run twice during the afternoon. Each participant will be able to attend two out of the four workshops. The workshops will be in the following areas:

- Workshop A: Getting the Right Person for the Job. Recruiting, interviewing, screening, and reference checking.
- Workshop B: Guidelines for Effective Performance Appraisal.
- Workshop C: Developing Your Personal "Benefits" Portfolio.
- Workshop D: Recent Developments in the area of Affirmative Action - including discussion of the implications of the Bakke decision.

Session #2 - Management Stress — January 31, 1978

Sandy Jenks, Director, University Counseling Services, and Dr. John B. Sturrock, Director, College Mental Health Center of Boston, have offered to present a program dealing with causes, effects, and methods of dealing with stress. This presentation should be helpful to us in assisting people who are in stressful situations and in dealing with such situations in our own lives.

Session #3 - History of Boston College — February 21, 1979

Father Donovan has agreed to repeat his very informative presentation on the history of Boston College. This is one of the sessions that was oversubscribed last year, and we are pleased to have the opportunity to offer it again for those of you who may have missed it.

Session #4 - Applied Management — May 2, 1979

John Smith will conduct a session on the application of management skills to key elements in the business and finance operations of the University. We will have more details on this session later on.

Session #5 - Financial Planning Workshop June 6 and 20, 1979

Frank B. Campanella has a hands-on project to introduce the financial planning model as a tool to assist in University decision making. This is a two part exercise. At the first session, Frank introduces and explains the project. During the two weeks, the groups report on the results of their experience. We have scheduled this session after the school year is over, when people will have more time to work on the project.

REGISTRATION PROCEDURE

We had some problems with our advance registration procedures for MDP II last year. As a result, we are going to use a very simple, direct method this year. Approximately three weeks before each session, we will send out a general announcement confirming the nature and timing of the forthcoming session. If you wish to attend the session, you will be asked to contact Judy Kissane on Ext. 3255 to sign up. The sign up will be maintained on a first come first serve basis. If we are oversubscribed, we will maintain a waiting list. If you sign up and find that you are unable to attend, it is important that you call Judy to let her know so that we may substitute someone from the waiting list.

RECEPTION

As you know, we wrap up each of our MDP I programs with a social hour. We invite our prior graduates and our session leaders to join us in this informal get-together. The date is Wednesday, November 29 at Putnam House from 3:30-5:30 pm. Hope you can make it!

MDP II SCHEDULE

You may wish to mark your calendars with the following dates:

Wednesday	November 29	Social Hour at Putnam House - 3:30
Wednesday	December 6	Personnel Skills Workshop
Wednesday	January 31	Management Stress
Wednesday	February 21	History of Boston College
Wednesday	May 2	Applied Management
Wednesday	June 6 and 20	Financial Planning Model

ENDICOTT HOUSE ON TV

There was a note in last week's Globe that might be of interest.

> "Poet-composer Rod McKuen and singer Dusty Springfield have been in town for two days, taping a Christmas special at the historical Endicott House in Dedham, to be televised on Channel 7 on November 30. "Rod McKuen's Christmas in New England" will feature the St. Paul's Boys Choir of Cambridge and a chorus of local singers."